EXHIBIT 1

PrimeTime F&S version 1.3

# User's Guide

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Chapter 1

# Welcome to PrimeTime

Welcome to PrimeTime F&S, a forecasting and scheduling program for call centers. This chapter will introduce you to PrimeTime's features and explain the structure of the program.

Available in both single-user and multi-user versions, PrimeTime defines a new standard for efficiency and ease of use. With PrimeTime, you will easily:

- Manage multiple groups of call center agents.
- Forecast call volumes and agent requirements.
- Set meetings, breaks, and other non-phone time periods for your agents.
- Design efficient schedules that meet your needs, including schedules for 24-hour operation, if desired.
- Print schedules and reports as graphs or tables.
- Test "What if ?" scenarios to find what best suits your needs.
- Monitor call center performance using PrimeTime Pulse, which graphically displays the differences between predicted and actual performance.

PrimeTime offers this power through a simple point-and-click user interface and displays information in easy-to-grasp graphical and tabular views. You can copy and paste employee information, shift patterns, call volume histories, and even entire schedules. Within an hour or two after you begin to work with PrimeTime, you will have built your first schedule.

By using PrimeTime to properly staff and schedule your center, you can:

- Reduce costs by reducing unnecessary overstaffing.
- Increase revenue from previously lost sales by reducing the number of abandoned calls.
- Increase customer satisfaction by decreasing the amount of time customers must spend on hold.
- Simplify the tedious, repetitive, and frustrating process of personnel scheduling.

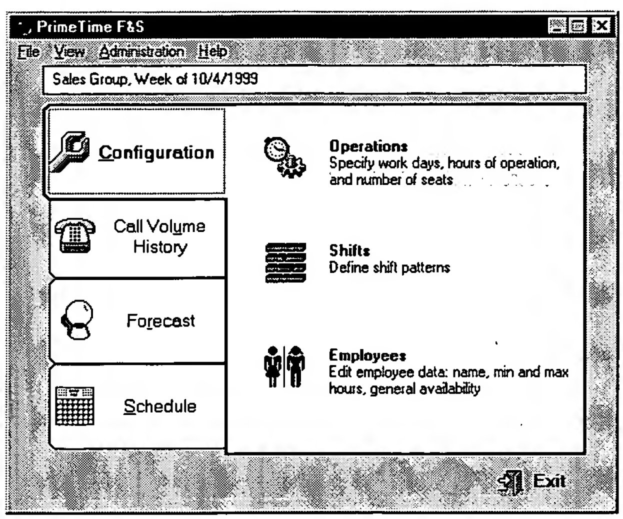
## MULTI-USER OPERATION

PrimeTime is now available in both single-user and multi-user forms. In a multi-user installation, the PrimeTime database resides on one computer (the server). Other computers (the clients) run local copies of PrimeTime that work with the PrimeTime database on the server rather than on their local hard disks. When multiple users view the same schedule or other data at the same time, only one user is allowed to make and save changes (read/write permission)—others have only read-only permission until the first user gives up read/write access.

With the PrimeTime User Manager that accompanies the multi-user version of PrimeTime, you can easily manage multiple PrimeTime users. You can assign login names and passwords, and you can assign each user different permission levels (no access, read-only, or read/write) for each data group.

## PRIMETIME OVERVIEW

PrimeTime divides your call center scheduling tasks into four primary modules. These four modules correspond to the four tabs in PrimeTime's main window (the Home screen). Each tab displays icons for the tasks associated with that module—just click on a task icon to begin work on that task.



- In the Configuration module, you will enter your call center's operation parameters. When is the center open? What shift patterns are available? Who are your employees? What is their availability?
- In the Call Volume History module, you will maintain historical call volume as reported by your ACD (automatic call distributor). Here you will also build call volume profiles—statistical models of intra-day and intra-week call volumes to use in forecasting.
- In the Forecast module, you will determine the expected number of calls, in 15-minute intervals, for the week being scheduled. PrimeTime will then calculate the number of agents required to provide the target service level.
- In the Schedule module, you will create the master weekly schedule. Once an initial master schedule is created, you can modify it to add further constraints, such as meetings, for example. You can also create new schedules to compensate for changes. Here you will also generate comparative reports of service levels, call volumes, staffing levels, and statistics of operation.

PrimeTime's Wizard view makes it easy to navigate between modules—and between tasks within a module—by always clearly leading you to the natural next step. Once you are comfortable with PrimeTime, you can use PrimeTime's Instant Access view to navigate even more quickly and efficiently.

## Configuration

You'll use the Configuration module primarily when you first set up PrimeTime for your call center. Later, you'll also use it when you add new employees, change your call center's hours of operation, or change an employee's availability. In addition, you'll return to the Configuration module when you are exploring "What if?" scenarios or are re-engineering your call center.

In the Configuration module, you'll provide the following information:

- Operation Parameters: You will enter the call center's days and hours of operation, as well as the maximum number of seats available. If your call center is a 24-hour operation, you will also enter information about the week boundary, minimum time between shift assignments, and so forth.

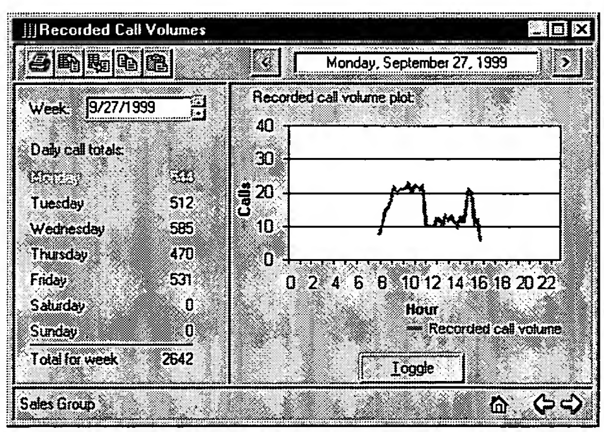
- Shifts: You will define your call center's different shift patterns. You will be able to choose different shift lengths and start times. For each shift pattern, you will enter the number of breaks (including training, and other non-phone time) and specify the time windows in which the breaks may fall.
- Employees: For each employee, you will enter the employee's minimum and maximum paid work hours per week, the shift patterns the employee may work, and the employee's regular hours of availability.

## Call Volume History

The historical call volume data provided by your ACD is the key to good forecasting and to building accurate models of call volume behavior. In the Call Volume History module, you'll maintain a database of that call volume data (recorded at 15-minute intervals), which can be pulled directly from the ACD, imported from text files, or entered manually. From this historical call volume data, you'll create profiles—statistical models of call volume behavior—to use in forecasting.

This module consists of two components:

- History: Here you may view, import, export, or modify call volume history.
- Profiles: Here you will build statistical models for prototypical days and weeks of operation (for example, for a holiday weekend, for the week following a catalog drop, and so forth).



## Forecast

PrimeTime forecasts a week at a time, dividing the work hours into 15-minute intervals. In the Forecast module, you will select a profile to use in forecasting the week's call volumes, set the service level goals for the week, and determine the agent requirements based upon the selected profile and service goals:

- Forecasting: You will choose a profile to forecast the selected week's call volume. You can proportionately adjust the number of calls, based upon your projections for that week. PrimeTime will scale the number of calls up or down (i.e., renormalize) and graphically display the impact.
- Service Goals: You will specify your service goals in terms of service level or average speed to answer (ASA). PrimeTime will ask you for additional data such as talk time, wrap-up time, call abandon rates, and absenteeism.
- Agent Requirements: You will use your forecast and service goal parameters to calculate the number of required agents for each 15-minute interval during the specified week. You may view, print, or export this data. You may also quickly calculate the number of full-time equivalents (FTEs).

## Schedule

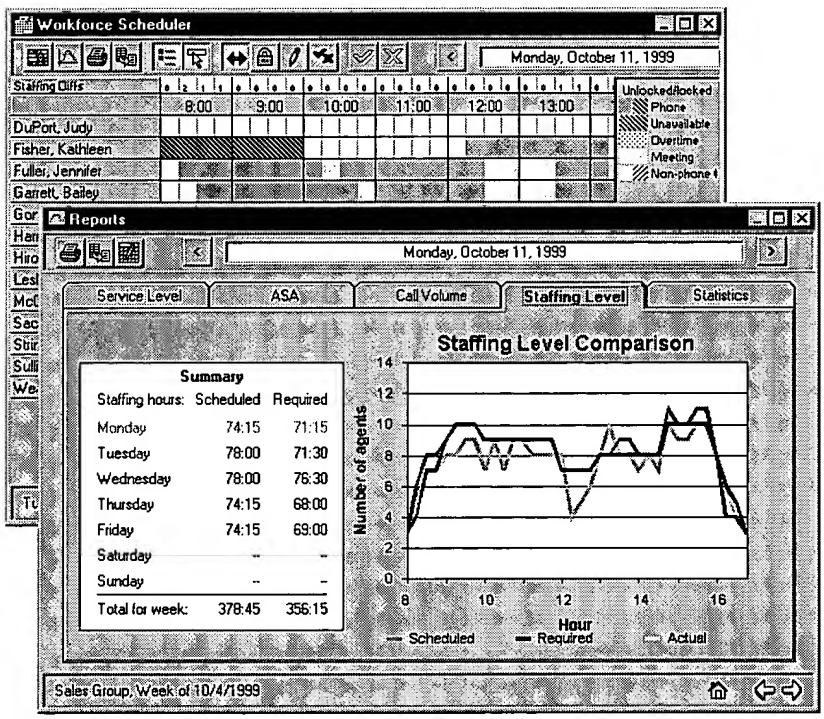
In the Schedule module, you'll develop the weekly master schedule, the heart of PrimeTime. All the previous tasks are necessary to reach this point.

- Schedule: With one mouse click, the PrimeTime scheduling engine will populate the work schedule in just a few seconds, displaying the solution graphically. The schedule conforms to your constraints and parameters and provides the best possible match to the agent requirements. If the generated solution is satisfactory, you may simply print and post the schedule.

  However, the solution PrimeTime generates may not always meet all your practical requirements. So PrimeTime lets you use your experience and intuition to collaborate with the computer, to find the best possible schedule.

  The schedule window includes tools to modify the schedule. You may drag shifts and breaks across the day, edit shift assignments, or lock them in place. You may schedule meetings and find the times that create the fewest schedule conflicts, and you may add or remove agent unavailabilities. PrimeTime will regenerate the schedule to compensate for your changes.

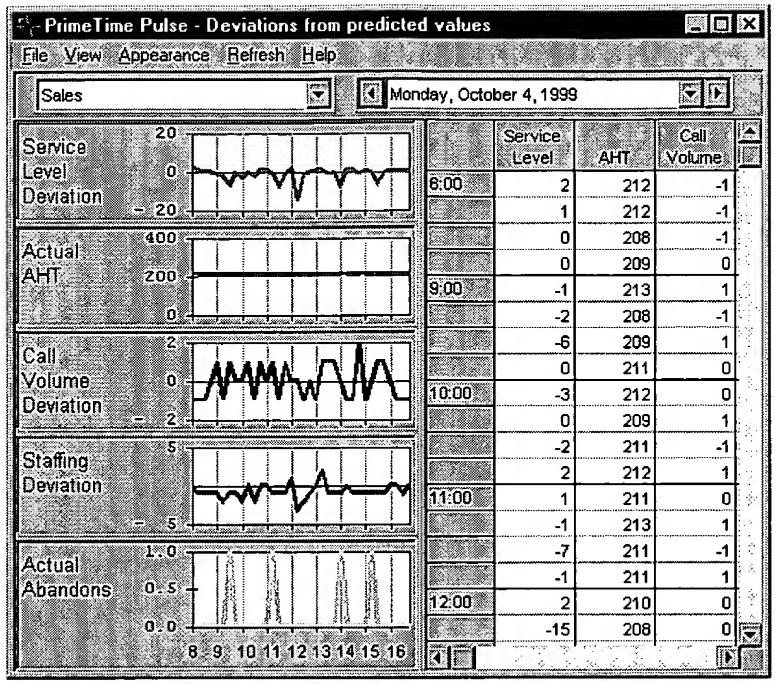
- Reports: A variety of reports is tightly coupled with the schedule:
  - Projected service levels.
  - Average speed to answer.
  - Call volume comparison.
  - Comparison of staffing provided by the schedule to agent requirements.
  - Operational statistics on overstaffing and understaffing, phone and non-phone time, overtime, and other items.




## PrimeTime Pulse

In addition to the PrimeTime F&S reports, the separate PrimeTime Pulse application provides another view of your call center performance.

PrimeTime Pulse collects your call center data throughout the day. Unlike the PrimeTime F&S reports, which display the actual numbers for your required or predicted values and your actual performance, PrimeTime Pulse displays the deviation of your actual performance from your required or predicted values. That is, PrimeTime Pulse graphically displays the *difference* between your actual values and your predicted values so that you can quickly see where you've met or exceeded predictions and where you've undershot them.




Through its ongoing collection of data and highlighting of deviations, PrimeTime Pulse enables you to quickly analyze your performance throughout the day and take corrective action when needed.

## WHAT'S NEXT?

To install PrimeTime F&S, turn to Chapter 2, which will lead you through the brief steps necessary.

Once you've installed PrimeTime, move on to Chapter 3 for a quick tutorial on setting up PrimeTime for your call center and creating a forecast and schedule.

After that, turn to Chapters 4 through 9 for more detailed information on PrimeTime commands, or just launch PrimeTime and jump right in!

Chapter 2

# Installing PrimeTime

This chapter provides instructions for installing PrimeTime F&S and its associated files on your computer.

**Note** *The instructions in this chapter and following chapters assume that you're familiar with standard Windows 95 or Windows NT techniques, such as clicking and dragging with the mouse, opening and closing windows, and so forth. If you need help with these items, please see your Windows documentation.*

## WHAT THE PACKAGE CONTAINS

Your PrimeTime F&S package should contain the following:

- PrimeTime F&S CD-ROM disc, single-user or multi-user version.
- *PrimeTime F&S User's Guide* (this manual).

## WHAT YOU NEED TO INSTALL PRIMETIME

For PrimeTime F&S, the minimum hardware and software requirements are:

- 80486 or Pentium processor (or better).
- Windows 95, Windows NT 3.51 (with Service Pack 5), or Windows NT 4.0.
- 16 megabytes of RAM (32 megabytes recommended).
- 30 megabytes of free disk space (plus 100–200K per schedule).
- CD-ROM drive (for software installation).

# INSTALL PRIMETIME

PrimeTime is available in two versions:

- Single-user version: Order this version if you don't need multi-user access. The single-user version does not install the multi-user security measures or the PrimeTime User Manager.
- Multi-user version: Order this version if you need multi-user access. The multi-user version includes security measures (user passwords, group access, and group locking) and the PrimeTime User Manager, and it installs both PrimeTime server and PrimeTime clients.

You must order the PrimeTime multi-user CD-ROM to install the multi-user version of PrimeTime or the single-user CD-ROM to install the single-user version. You can't do both single-user and multi-user installations from the same CD-ROM. If you do not have the proper CD-ROM for the version you want to install, please contact Blue Pumpkin Software.

## Installing PrimeTime, single-user version

To install the single-user version of PrimeTime on your computer:

**1** Place the PrimeTime single-user CD-ROM disc in your CD-ROM drive.

**2** If you're using Windows 95 or Windows NT 4.0, click the Start button, and choose Run. If you're using Windows NT 3.51, choose Run from the Program Manager's File menu.

**3** The Run dialog box appears. If your CD-ROM is drive D, type

    d:\setup

to start the installation program. (If your CD-ROM drive is assigned to a different drive letter, substitute the proper letter in the command—for example, e:\setup or f:\setup.)

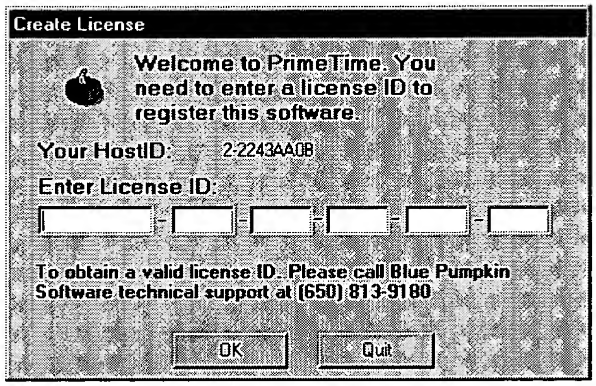
**4** Follow the onscreen instructions for a normal Windows installation.

**Note** *If you install PrimeTime 1.3 on a computer where PrimeTime 1.2 was already installed, you can choose to convert your PrimeTime 1.2 database to PrimeTime 1.3. If you convert, the 1.2 database is copied to the PrimeTime 1.3 folder and then converted. The original 1.2 database remains untouched.*

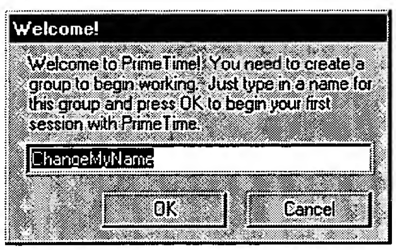
**5** When the installation is complete, double-click the PrimeTime icon on your desktop, or choose PrimeTime 1.3 from PrimeTime folder on the Windows

Start menu. (In Windows NT 3.51, double-click the PrimeTime icon in the Program Manager.)

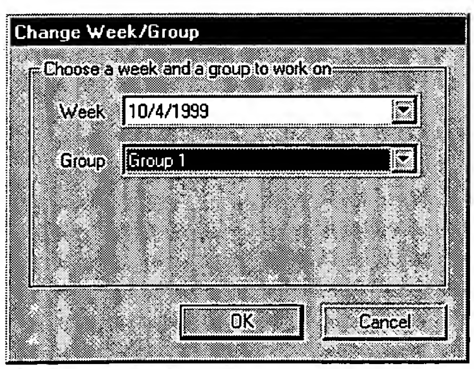
The following window will appear, and you'll be asked to enter your PrimeTime license ID. If you don't already have a license ID, call the phone number given in the window, and Blue Pumpkin Software will supply one.




6 Next, because you have not yet defined any call center groups, PrimeTime will ask you to define one. Type in a name for a starting call center group, if you have one ready. If you don't, enter a generic name, such as Group 1—you'll be able to rename it or delete it later. Click *OK* to proceed.




7 Then PrimeTime will display the following window and ask you to choose a week and a group to work with.



You can click *OK* to accept the default week and group, and you'll be ready to start using PrimeTime.

See the tutorial in Chapter 3 for a guided tour of PrimeTime's features.

## Installing PrimeTime, multi-user version

To install the multi-user version of PrimeTime, you must first install the PrimeTime server on the computer that will act as your PrimeTime server. Once the server is installed, you can install PrimeTime clients on any computer on the network, including the computer where PrimeTime server is installed.

**Note** *To enable network access to the PrimeTime server, the disk or folder in which the PrimeTime server is installed must be shared on the network. See your network administrator or your Windows or network software documentation for information on sharing disks and folders on the network.*

### *To install the PrimeTime server*

The PrimeTime server includes the PrimeTime database, the PrimeTime User Manager, PTArchive, and the ACD utilities. It does not include the client applications, PrimeTime F&S and PrimeTime Pulse. See "To install PrimeTime clients" for instructions on installing those applications.

To install the PrimeTime server on your computer:

1. Place the PrimeTime multi-user CD-ROM disc in your CD-ROM drive.
2. If you're using Windows 95 or Windows NT 4.0, click the Start button, and choose Run.

   If you're using Windows NT 3.51, choose Run from the Program Manager's File menu.
3. The Run dialog box appears. If your CD-ROM is drive D, type

   ```
   d:\setup
   ```

   to start the installation program. (If your CD-ROM drive is assigned to a different drive letter, substitute the proper letter in the command—for example, e:\setup or f:\setup.)
4. Follow the onscreen instructions for a normal Windows installation.

**Note** *If you install PrimeTime 1.3 on a computer where PrimeTime 1.2 was already installed, you'll be given the option of converting your PrimeTime 1.2 database to PrimeTime 1.3. If you choose to convert, the PrimeTime 1.2 database is copied to the PrimeTime 1.3 folder and then converted, and the Administrator account is automatically given read/write access to all groups. The original PrimeTime 1.2 database remains untouched.*

5. When the installation is complete, go to the next section, "To install PrimeTime clients," to install the PrimeTime F&S and PrimeTime Pulse applications on computers on your network. We recommend that you install these applications on the computer that's acting as your PrimeTime server in addition to installing them on other computers on your network.

**Important!** *The PrimeTime server is installed with a simple default password. As soon as you have installed the PrimeTime server, you should immediately change the Administrator password from its default setting to a secure password known only by those people who should have Administrator access to PrimeTime. See "Manage PrimeTime users" in Chapter 9 for instructions on using PrimeTime User Manager to change passwords. DO NOT, under any circumstances, leave the Administrator password set to the default.*

*At the same time, you should also set up accounts for the people who will be using PrimeTime so that they can log in as soon as their PrimeTime clients are installed. See "Manage PrimeTime users" in Chapter 9 for instructions.*

### *To install PrimeTime clients*

You must install the PrimeTime server before you can install any PrimeTime clients. The PrimeTime server must be installed on a computer that is accessible to the client computer over a network.

**Note** *When you install the PrimeTime server, the installation does not include the PrimeTime client applications, PrimeTime F&S and PrimeTime Pulse. We recommend that you install these applications on the computer that has the PrimeTime server in addition to installing them on other computers on the network.*

To install PrimeTime clients:

1. On the client computer, open Windows Network Neighborhood, and locate the server where PrimeTime multi-user server has been installed. (If you're installing clients on the computer where the PrimeTime server has been installed, open My Computer instead of Network Neighborhood.)

2 On the server, locate and open the PrimeTime server folder, which is usually

c:\Program Files\Blue Pumpkin\PrimeTime\Ptfs13\

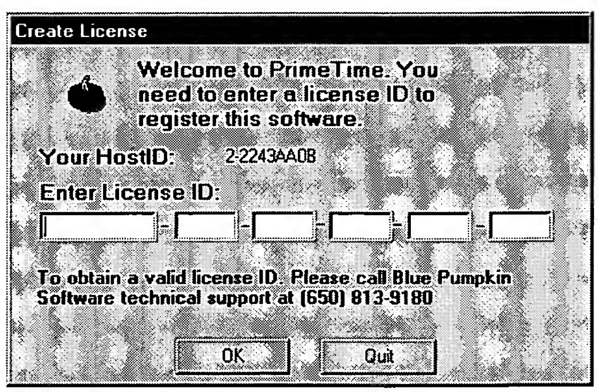
**Note** *If the PrimeTime server folder does not appear in your Network Neighborhood, check with your network administrator to make sure that the disk or folder where the PrimeTime server resides is set to be shared on the network.*

3 Inside the PrimeTime server folder is a folder named NetSetup. Open this folder, locate the program named setup.exe, and double-click it to start the installation.

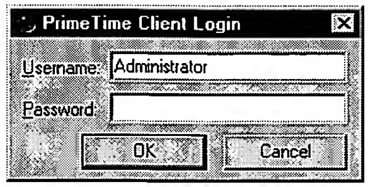
4 Follow the onscreen instructions for a normal Windows installation. The installer will install the PrimeTime client applications on the client computer and will make sure that these applications look for the PrimeTime database on the server (rather than locally).

5 When the installation is complete, double-click the PrimeTime icon on your desktop, or choose PrimeTime from the PrimeTime F&S (Client) folder on the Windows Start menu. (In Windows NT 3.51, double-click the PrimeTime icon in the Program Manager.)

The following window will appear, and you'll be asked to enter your PrimeTime license ID. If you do not already have a license ID, please call the phone number given in the window, and Blue Pumpkin Software will supply one.



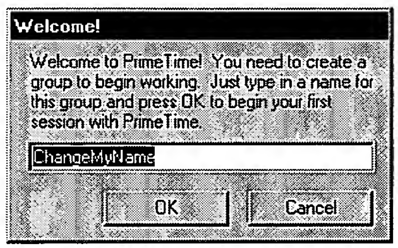

6 After you have entered the license ID, PrimeTime will display the following window and ask you to log in.




Enter your username and password, and then click *OK*. If you don't have a username and password, contact your PrimeTime administrator.

**Note** *PrimeTime Administrator: If you have not yet created any user accounts, see "Manage PrimeTime users" in Chapter 9 for instructions.*

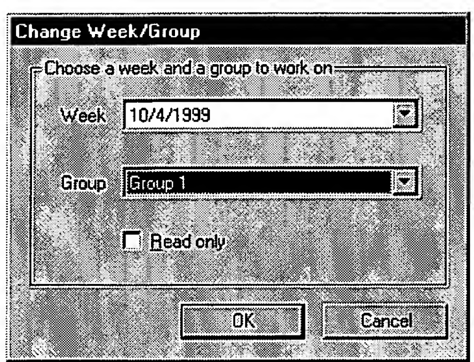
**7** Next, if no call center groups have been defined yet, PrimeTime will ask you to define one.




Type in a name for a starting call center group, if you have one ready. If you don't, just enter a generic name, such as Group 1—you'll be able to rename it or delete it later, if you want.

Click *OK* to close the window.

**8** PrimeTime will display the following window and ask you to choose a week and a group to work with.




You can click *OK* to accept the default week and group, and you'll be ready to start using PrimeTime. (See the tutorial in Chapter 3 for a guided tour of PrimeTime's features and functions.)

Once the client installation is complete, users can run the PrimeTime client on their own computers and log into the PrimeTime database just as if they were sitting at the computer where the PrimeTime server is installed.

## WHAT'S NEXT?

Once you've installed PrimeTime on your computer, you can go on to Chapter 3 for a tutorial on using PrimeTime or skip to Chapters 4 through 9 if you'd prefer to read about PrimeTime commands first.

Remember that you can get online help at any time while using PrimeTime. Just press the F1 key or click the Help menu on the PrimeTime Home screen.

## Chapter 3

# A PrimeTime Tutorial

This chapter offers you a quick tutorial for PrimeTime F&S. With PrimeTime's Wizard view to lead the way, you'll walk through PrimeTime's main functions in the same sequence you might use to set up and schedule your own call center. Working with the sample data provided for the tour, you'll be able to make changes, enter new information, generate forecasts, and create schedules.

PrimeTime's Wizard view is arranged so that the natural flow through its main modules follows the flow of your work. In this tutorial, you'll step through the following procedures, just as you would for your own call center:

- Select the work week to schedule.
- Set up call center hours.
- Set up shift patterns.
- Add employees and set availability.
- View call volume histories.
- Create call volume profiles.
- Forecast call volumes, based on the profiles.
- Set service goals.
- View agent requirements, based on the forecasts and service goals.
- Create schedules, based on agent requirements and employee availability.
- Generate reports comparing actual to projected performance.
- Review call center performance with PrimeTime Pulse.

To make the most of this tutorial, be sure to use PrimeTime to work on the sample data as you read through each step. (In order to keep the tutorial data intact so that you can use it again, you won't be able to save changes in the tutorial. But you will be able to see the results of all your changes during the session with PrimeTime.)

**Tip**

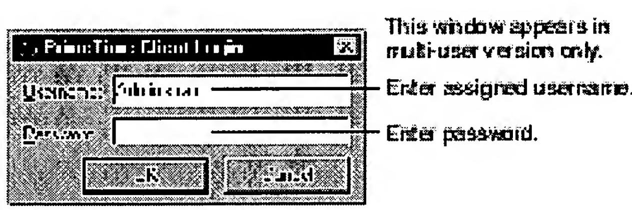
*Remember that you can get online help at any time while you're using PrimeTime. Just press the F1 key, or use the Help menu on the PrimeTime Home screen.*

## START PRIMETIME

To start PrimeTime and begin this tutorial:

PrimeTime F&S

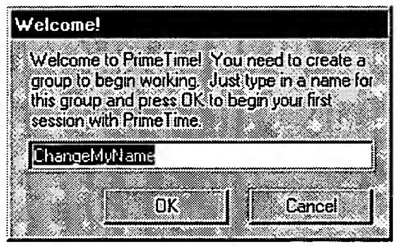
1. Double-click the PrimeTime icon on your desktop, or choose PrimeTime from the Windows Start menu. (In Windows NT 3.51, double-click the PrimeTime icon in the Program Manager.)
2. If you have not run PrimeTime before, PrimeTime will ask for a license ID. Please turn to Chapter 2, and follow the instructions in step 5 of "Installing PrimeTime, single-user version" or step 5 of "To install PrimeTime clients" in Chapter 2. Return to this tutorial when you've completed the appropriate step.
3. Next, if you are using the multi-user version of PrimeTime, you'll see the following window asking you to log in. (If you've installed the single-user version, you won't see this window—skip to step 4.)




Enter the username and password assigned by your PrimeTime administrator.

**Note** *PrimeTime Administrator: If you have not yet created any user accounts, see "Manage PrimeTime users" in Chapter 9 for instructions.*

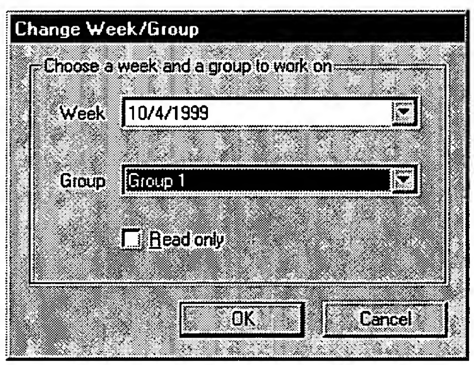
4 If you have not yet defined any call center groups, PrimeTime will now ask you to define one.




Type in a name for a starting call center group, if you have one ready. If you don't, just enter a generic name, such as Group 1—you'll be able to rename it or delete it later, if you want.

Click *OK* to close the window.

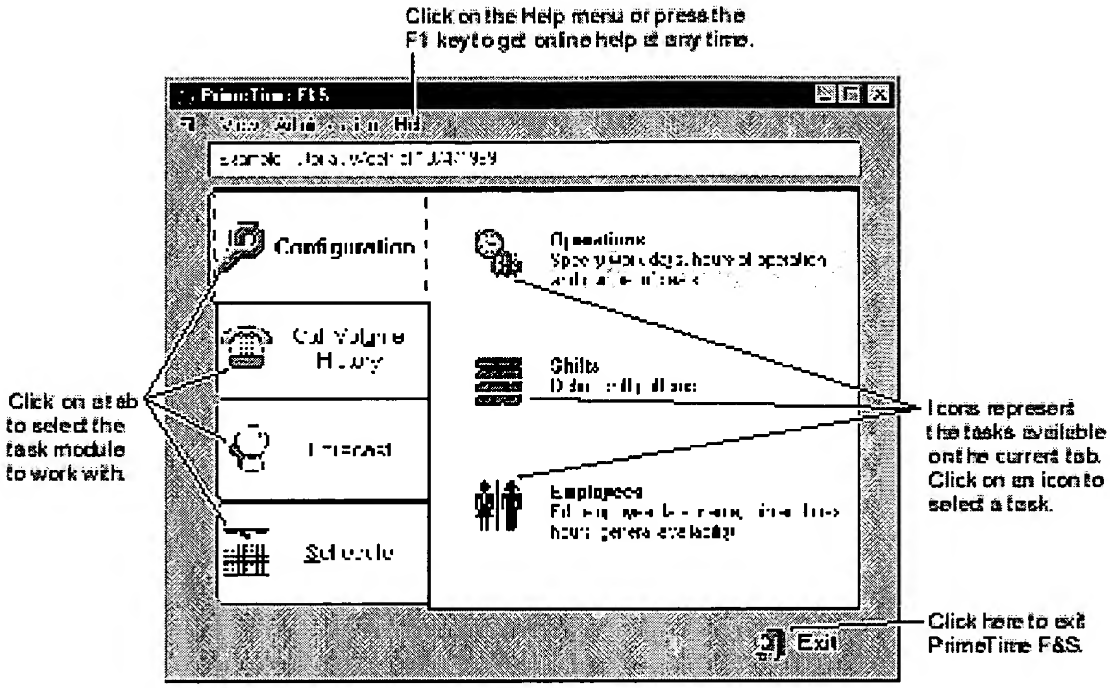
5 Next, PrimeTime will display the following window and ask you to choose a group to work with.

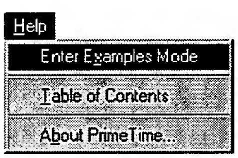



For this tutorial, just click *OK* to accept the default week and group. You'll be able to change these later.

**Note** *The Read only checkbox in the Change Week/Group window only appears in the multi-user version of PrimeTime, not in the single-user version. In the multi-user version, you must leave the box unchecked if you wish to make changes to the data for the selected group. If another user already has this group open with read/write access, the Read only box will be checked and grayed out so that you can't change it. In that case, you can only open the group as read-only and will not be able to make changes.*

6 PrimeTime will next display the Wizard view Home screen, where you'll start most of your work with PrimeTime.



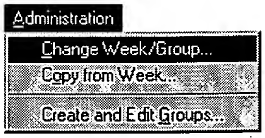

**7** To enter Examples Mode for the tutorial, choose Enter Examples Mode from the Home screen's Help menu. (To leave Examples Mode at any time, just choose Exit Examples Mode from the Help menu.)

The Change Week/Group window will appear again, as in step 5. For this tutorial, click *OK* to accept the default settings for the moment. The status box just under the Home screen menus will display the words "Example Tutorial." The words will be in red to indicate that you are in Examples Mode and will not be able to save changes.

## SELECT THE WORK WEEK AND GROUP

The first step in working with PrimeTime is to select the week and group that you want to work with. When you first start PrimeTime, you have to select a week and group, just as you did in the previous section, but you can also change to a new week or group at any time.

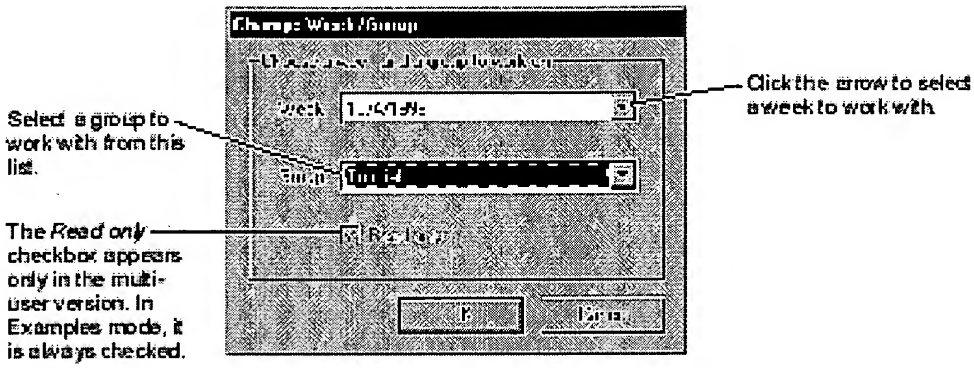
For this tutorial, you need to select the week of October 4, 1999, which has been pre-loaded with sample data for you to work with.



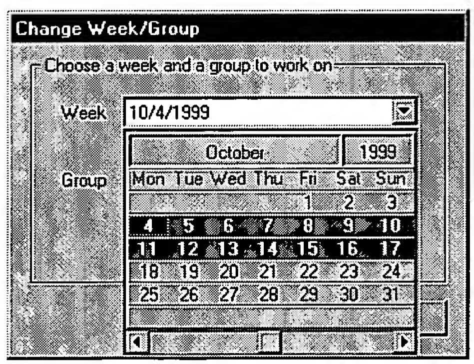

To select the work week:

**1** Click on the Administration menu on the Home screen.

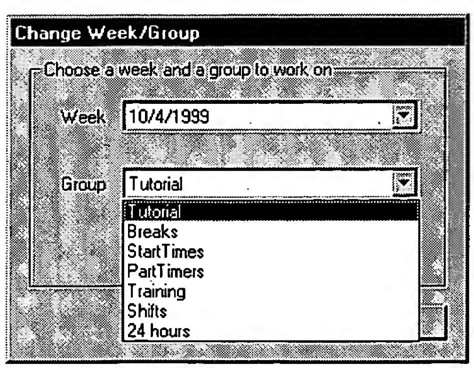
**2** Choose Change Week/Group from the menu. The Change Week/Group window appears.




**3** Click the arrow by the *Week* box to select a week to work with. On the calendar that appears, use the horizontal scroll bar to move to October 1999, and then click on the week of 10/4/1999 to select it.




**4** Then click the arrow by the *Group* box, and choose *Tutorial* from the list.



**Note** *In addition to the Tutorial group, the* Group *list includes other groups with other sets of sample data you can practice on. Appendix B and PrimeTime Help both give more information about the features of these other sample groups. (Choose Table of Contents from PrimeTime's Help menu to open PrimeTime Help.)*

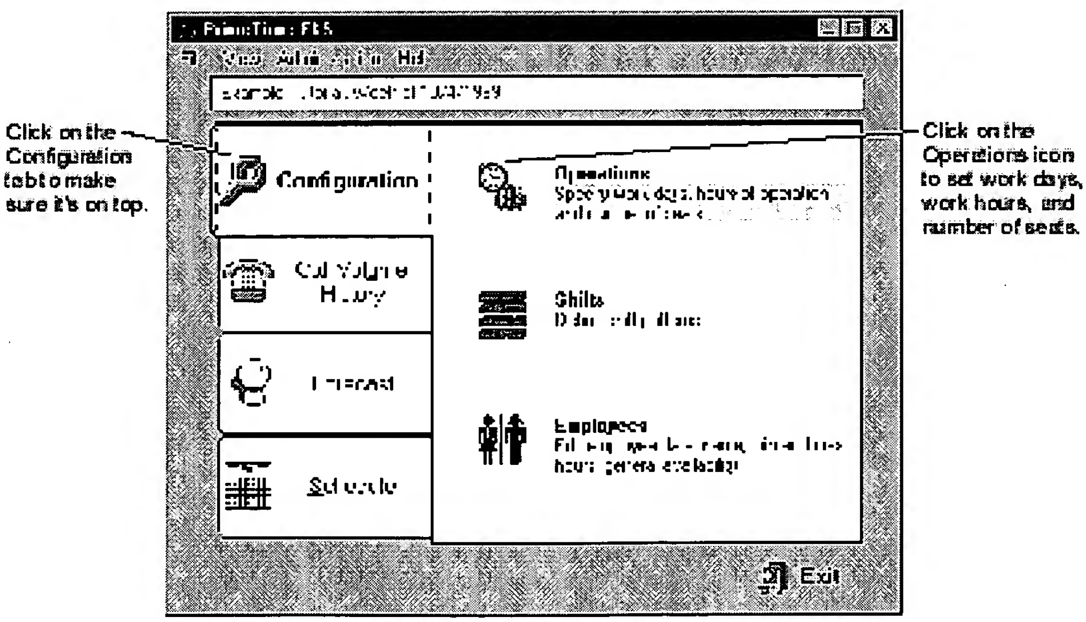
**5** Click *OK* to close the Change Week/Group window.

You're now set to work with the data from the week of October 4, 1999.

## SET HOURS OF OPERATION

To start, let's view and edit the call center's hours of operation.

**1** On the Home screen, click on the Configuration tab to make sure it's on top.

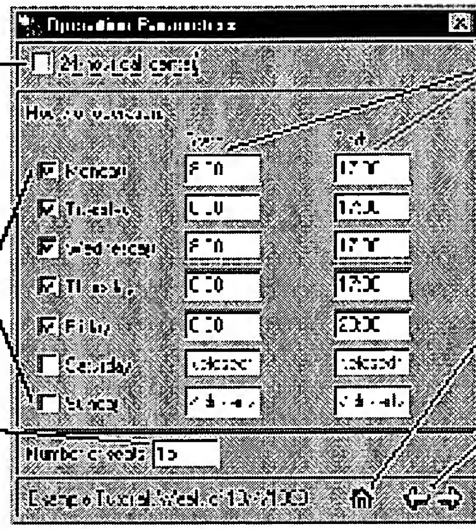



**2** Click on the Operations icon to open the Operation Parameters window.

**3** To set or change the days your call center is open, just click in the *Monday* through *Sunday* checkboxes on the left side of the window. For example, if Monday were a holiday for your call center this week, you would click in the *Monday* checkbox to deselect it.

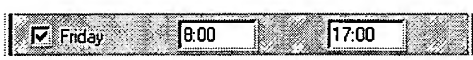
For this tutorial, make sure that *Monday* through *Friday* are selected and that *Saturday* and *Sunday* are deselected. Also make sure that *24-hour call*

*center* is deselected. (See Chapter 5 for information on setting up 24-hour call center operation.)




**4** To set or change the hours of operation for each day, click in the *Start* and *End* boxes next to the appropriate day, and then enter the new time. Enter the times in 24-hour form (1 pm = 13:00, 2:30 pm = 14:30, and so forth).

For this tutorial, change the Friday end time from 20:00 to 17:00 so that it matches the other weekdays.




**5** To set or change the number of seats in your call center (that is, the number of workstations available to take calls), click in the *Number of seats* box, and enter the proper number.

Make sure the number of seats is set to 15.

**Note** *The value you enter for* Number of seats *represents the maximum number of people who can take calls in your call center at any one time. PrimeTime will never schedule more than this number of call center agents for work at once.*

**6** Click the *Home* button to return to the Home screen.

**Tip** *You can also click the ⇦ ⇨ buttons, found in the bottom right corner of each main PrimeTime task window, to move directly to the next or previous task without returning to the Home screen. Click the right arrow to move to the next task or the left arrow to move to the previous task.*

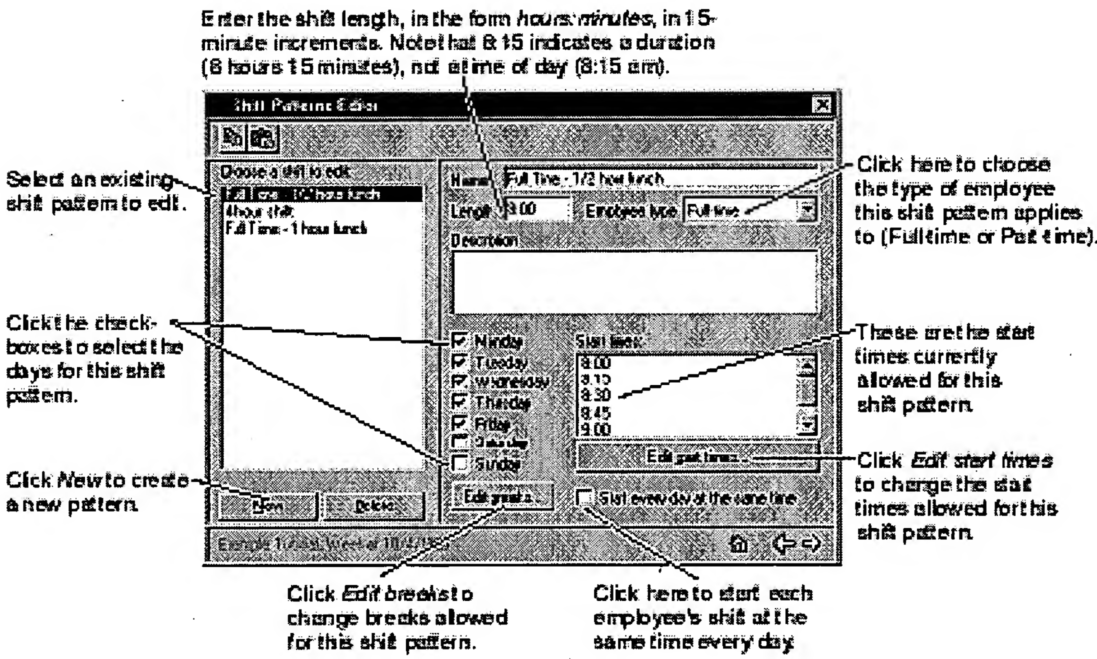
## SET SHIFT PATTERNS

Now that you've set the call center hours for this week, you need to check the available shift patterns as well. A shift pattern specifies how long a shift is and at what times it can start. A shift pattern also specifies how many breaks there are for the shift, how long each break lasts, and when the breaks can be taken.

**Note** *Breaks include all non-phone activities scheduled during working hours. So lunch breaks, coffee breaks, closed-key activities, training sessions, medical appointments, etc., are all classified as "breaks."*

**1** On the Home screen, click on the Configuration tab to make sure it's on top.

**2** Click on the Shifts icon to open the Shift Patterns Editor.




**3** At the left side of the Editor window, click on the *Full Time - 1/2 hour lunch* shift pattern to select it. The information in the rest of the window now shows the settings for the *Full Time - 1/2 hour lunch* pattern.

**4** To set or change the shift length, click in the *Length* box and enter the length in the form *hours:minutes*. Note that in this box, an entry of 8:15 indicates a duration (8 hours 15 minutes), not a time of day (8:15 am).

For this tutorial, make sure *Length* is set to eight hours (8:00).

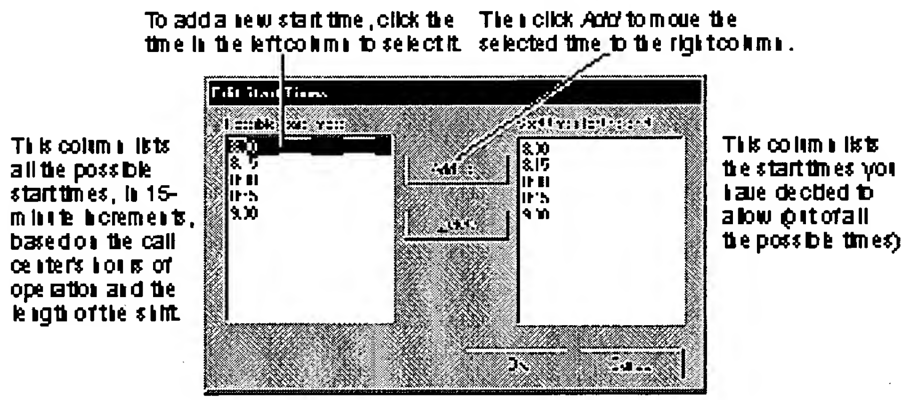
5 To set or change the employee type (Full-time, Part-time, Contract) this shift pattern applies to, click the *Employee type* box, and select from the list.

For this tutorial, make sure the *Employee type* is set to *Full-time*.

6 To select the days of the week that this shift pattern applies to, click the checkboxes next to the days to select or deselect each day. A check in the box indicates that the day is selected.

For this tutorial, make sure that *Monday* through *Friday* are selected and that *Saturday* and *Sunday* are deselected.

7 To change the allowable start times, click the *Edit start times* button to open the Edit Start Times window. In the Edit Start Times window, the *Possible start times* box lists all the possible starting times for this shift pattern, given the call center's hours of operation and the shift length.




8 To add a new start time, click on a time in the *Possible start times* box to select it, and then click *Add* to add it to the *Start times for this shift* box.

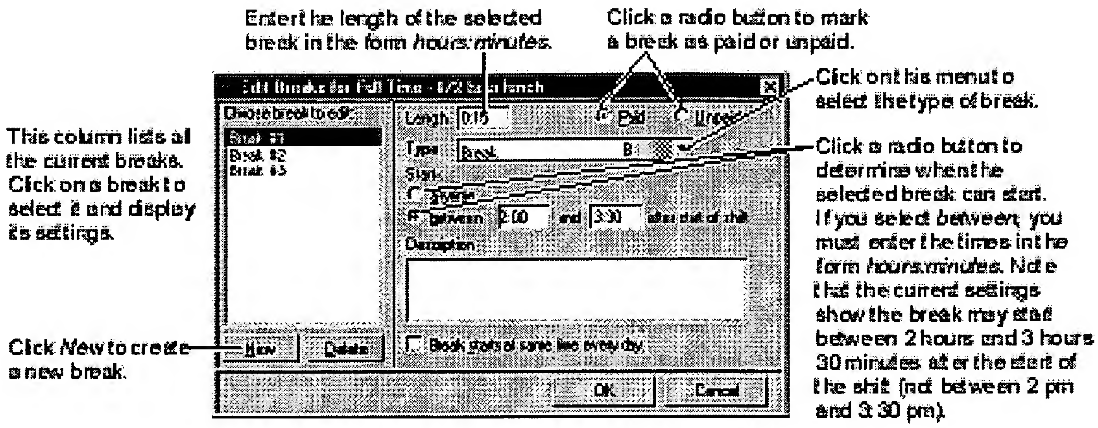
For this tutorial, make sure that 8:00, 8:15, 8:30, 8:45, and 9:00 are listed in the *Start times for this shift* box.

9 Click *OK* to close the window and return to the Shift Patterns Editor.

10 To have each employee's shift start at the same time every day, click the checkbox labeled *Start every day at the same time* to select it. When *Start every day at the same time* is selected, PrimeTime will still schedule different employees for different start times as needed to make an efficient schedule. However, PrimeTime will make sure that each individual employee is scheduled to start work at the same time every day.

For this tutorial, click *Start every day at the same time* to select it.

**11** To change the breaks for this shift, click the *Edit breaks* button to open the Edit Breaks window.



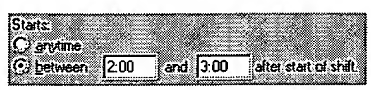

**12** Click on a break name in the left column to select that break and display its settings, or click *New* to create a new break.

For this tutorial, click on Break #1 to select it.

**13** For the selected break, you can change any of the information displayed, including the length of the break, the start time of the break (either any time during the shift, or between two set times), the type of break (break, training, medical, etc.), and whether the break is paid or unpaid.

Note that both the break length and the break start time are given in the form *hours:minutes*. In the illustration above, Break #1 is 15 minutes long and starts between 2 hours and 3 hours 30 minutes after the start of the shift (not between 2:00 pm and 3:30 pm).

For this tutorial, click the *between* radio button, and set the start time to between 2:00 and 3:00 hours after the start of the shift.




**14** Click *OK* to close the window and return to the Shift Patterns Editor.

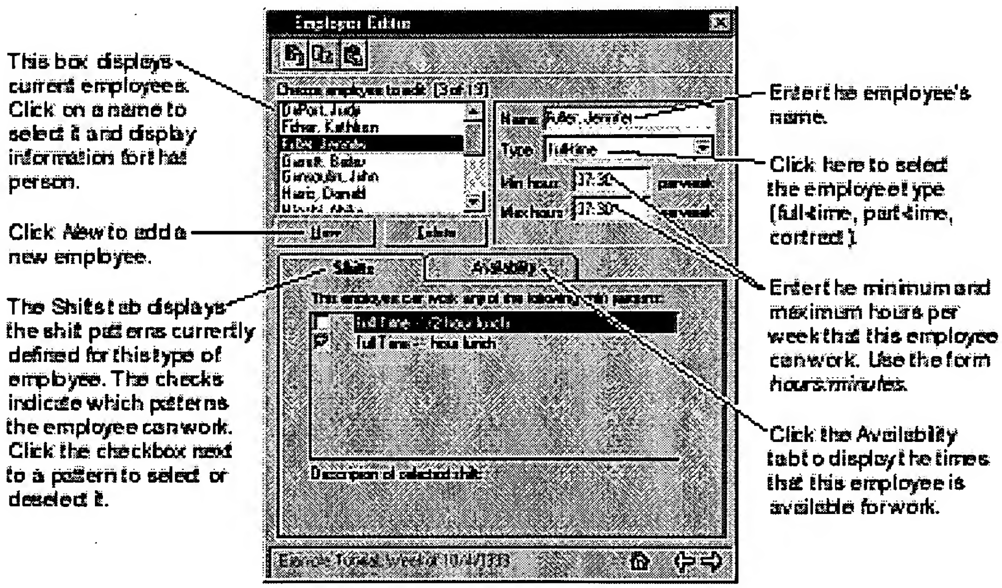
**15** In the Shift Patterns Editor, click the *Home* button to return to the Home screen.

# ADD OR EDIT EMPLOYEE INFORMATION

The last task in setting up your call center's operational information is to set the work-related information for your employees—minimum and maximum paid hours per week, shift patterns they can work, times they're available or unavailable, and so forth.

To add or edit employee information:

1. On the Home screen, click on the Configuration tab to make sure it's on top.
2. Click on the Employees icon to open the Employee Editor.




To view or edit an employee's information, click on the employee's name in the *Choose employee to edit* box. You can then view and change the employee's name, employee type, and minimum and maximum hours to work.

By clicking on the Shifts and Availability tabs at the bottom of the window, you can select the shift patterns an employee can work and edit the days and times the employee is available or unavailable during the current week.

## Add a new employee

For this tutorial, add a new employee named Silas Lapham:

1. Click *New* to add a new employee.

2 In the *Name* box, enter

Lapham, Silas

3 From the *Type* list, select *Part-time.*

4 Make sure that the *Min hours* box is set to

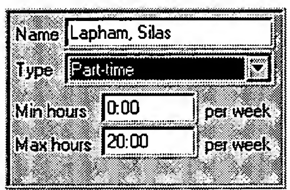
0:00

And make sure that the *Max hours* box is set to

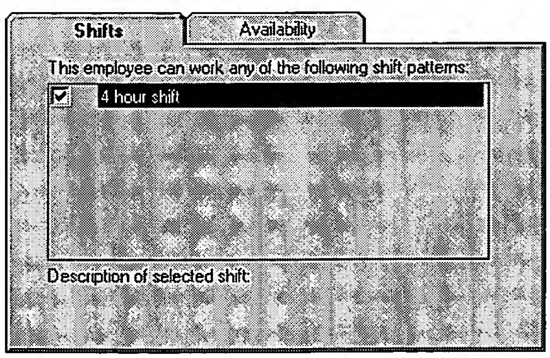
20:00

Both times should be in the form *hours:minutes*. Note that the *Max hours* entry must be equal to or greater than the *Min hours* entry.

The information you've entered should appear as follows:

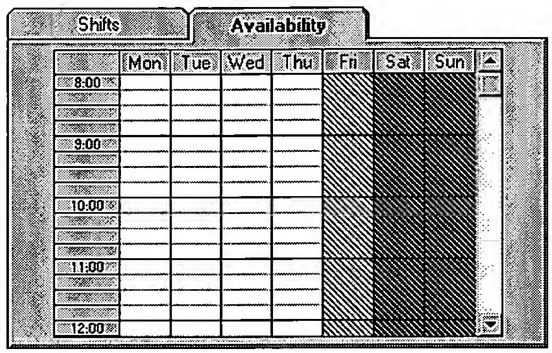



5 Click the Shifts tab to display the shift patterns available for part-time employees. The *4 hour shift* pattern is the only one available for part-timers—make sure that its checkbox is selected.




6 Click the Availability tab to display Silas' availability schedule for the current week. (Note that Saturday and Sunday are dark—unavailable—because the call center is closed on those days.)

**7** Make Silas unavailable to work on Friday. With your mouse, click on the 8:00 Friday block, hold down the mouse button, and drag straight down to the end of the Friday workday (17:00). The time blocks for that period will turn dark, as shown in the following screenshot:




Note that your click and drag acts as a toggle, reversing the current setting. If you click and drag starting in a light (available) block, all the blocks you cover will be changed to unavailable. If you click and drag starting in a dark (unavailable) box, all the blocks you cover will be changed to available.

You can also make an entire day unavailable by double-clicking on the day's name. Double-click again to make the whole day available once more.

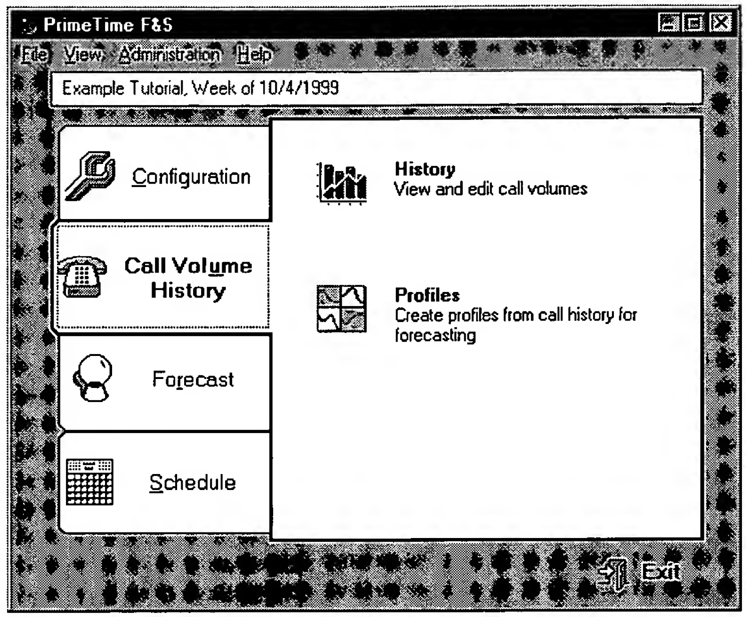
**8** Click the *Home* button to return to the Home screen.

## VIEW CALL VOLUME HISTORY

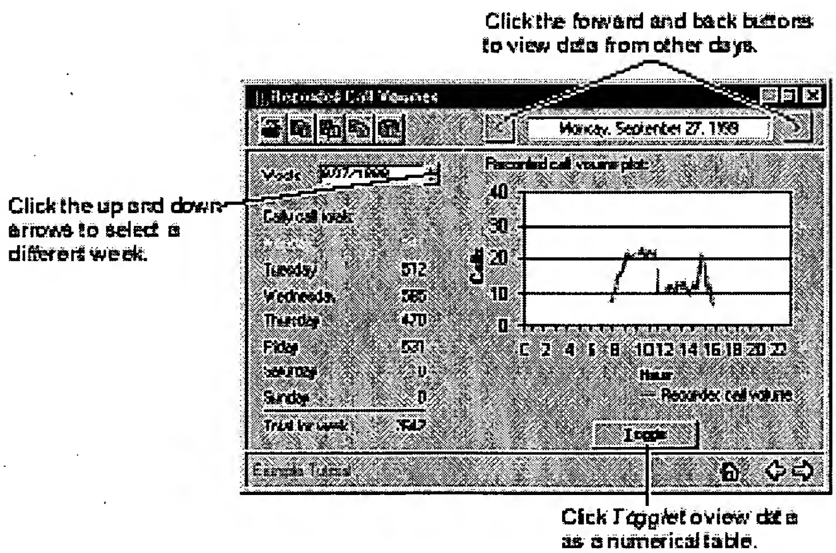
Now that you've completed the steps needed to set up the basic operational parameters for your call center, you need to give PrimeTime some data to work with—the historical data of call volumes in your call center. For this tutorial, we've provided some sample data to work with. In normal operation, PrimeTime would import data directly from your ACD (automatic call distributor), or you could import data from text files or enter data directly into PrimeTime by hand.

To view the available call volume histories:

**1** On the Home screen, click on the Call Volume History tab to select it.



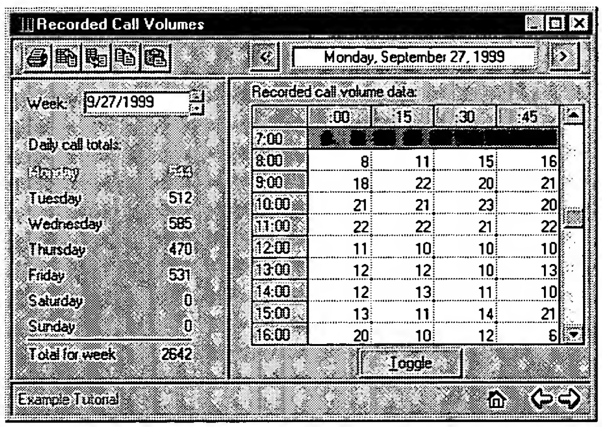

 **2** Click on the History icon to open the Recorded Call Volumes window.




**3** Use the *Week* box at the upper left corner of the window to select the week whose call volume data you want to view. Click on the up and down arrows to move forward or back through the weeks, as needed. (For this tutorial, you're going to be scheduling the week of 10/4/99, so that week has no call volume history—it's the current week.)

4 The upper right portion of the screen lists the day whose call data is currently being displayed. Click the forward and back buttons to view other days of the week, or click the name of the day you want in the *Daily call totals* list.

5 Click the *Toggle* button at the bottom of the screen to display the day's call data as a numerical table instead of a graph. Click *Toggle* again to return to the graph.




6 Click the *Home* button to return to the Home screen.

## CREATE A CALL VOLUME PROFILE

PrimeTime uses your weekly historical call volume data to help create forecasts of future call volumes. But any particular week, however "normal" it may seem, will have at least a few quirks, major or minor. So rather than basing its forecasts directly on the quirks of a single week, PrimeTime averages the call volume data from any number of weeks you select and then creates a more general profile of your call volume. This profile smoothes out the quirky variations of any single week and provides a more accurate prediction of weeks to come. You can, in addition, create a variety of profiles to suit different situations (such as a holiday week or a catalog drop week).

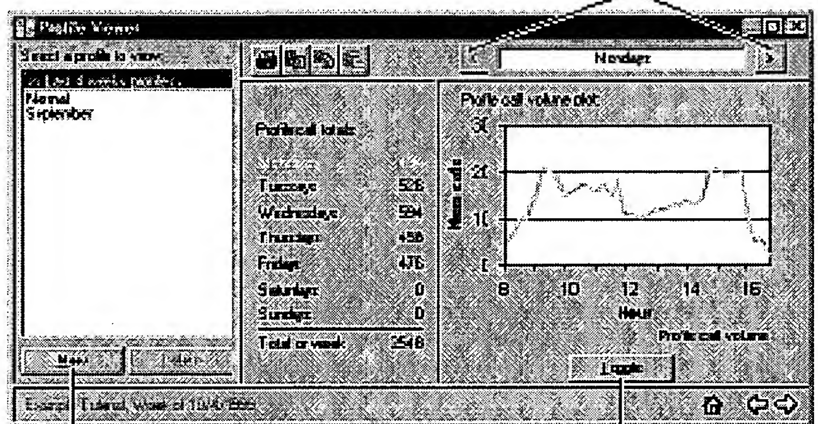
To view or create a call volume profile:

1 On the Home screen, click on the Call Volume History tab to make sure it's on top.

**2** Click on the Profiles icon to open the Profile Viewer.

Click the forward and back buttons to view data from other days.

This box lists the profiles currently available. Click on a profile to select it and display its settings.



Click *New* to create a new profile.

Click *Toggle* to view data as a numerical table.

**3** The *Select a profile to view* box lists the profiles currently available for use. Click on the name of a profile to display the profile information.

The call volume information for the selected profile is displayed just as in the Call Volume History window shown earlier. You can click the *Toggle* button to switch between the graph and numerical table displays, and you can use the forward and back buttons at the top to view different days of the week.

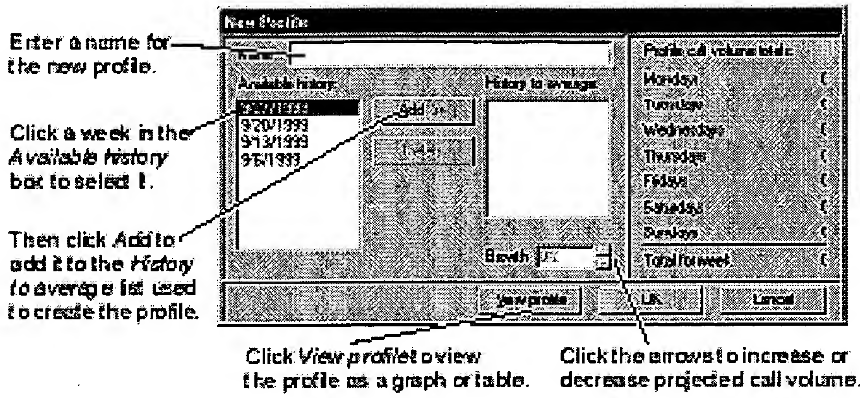
The >>*Last 4 weeks profile*<< is a default PrimeTime profile that averages the call volume data from the previous four calendar weeks. (If only three of the previous four weeks contain data, for example, the results are averaged over three weeks rather than four.) If you double-click the >>*Last 4 weeks profile*<< item, PrimeTime will open the Automatic Profile window, in which you can change the number of weeks used in the automatic profile.

## Create a new profile

To create a new profile:

**1** Click *New* to create a new profile. The New Profile window appears.

**Note** *Because you are in Examples mode, you will not be able to save this new profile, but you will be able to work through all the steps and see the profile you've created.*




**2** In the *Name* box, enter the following name for this new profile:

Fall season

**3** The *Available history* box displays the weeks of historical call volume data that you have available to work with.

Click on the week of 9/27/99 to select it, and then click *Add* to add that week to the *History to average* box. Do the same for the weeks of 9/20/99 and 9/13/99.

**4** Click *View profile* to see the call volume profile created from these three weeks, and then click *Done* to return to the New Profile window.

**5** If you expect future weeks to follow the same general pattern, but you also expect your call volume to grow, you can specify a growth percentage for the profile.

For this tutorial, click the up and down arrows by the *Growth* box to set the growth to 5%.

**6** Click *View profile* again to see the result, and then click *Done* to return to the New Profile window.

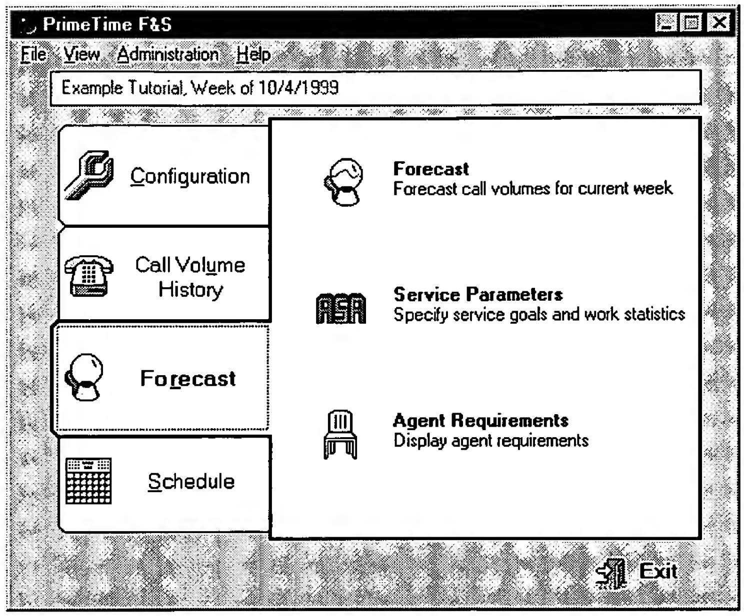
**7** Because you are in Examples mode, you won't be able to save this new profile. Click *Cancel* to close the New Profile window and return to the Profile Viewer.

**8** Click the *Home* button to return to the Home screen.

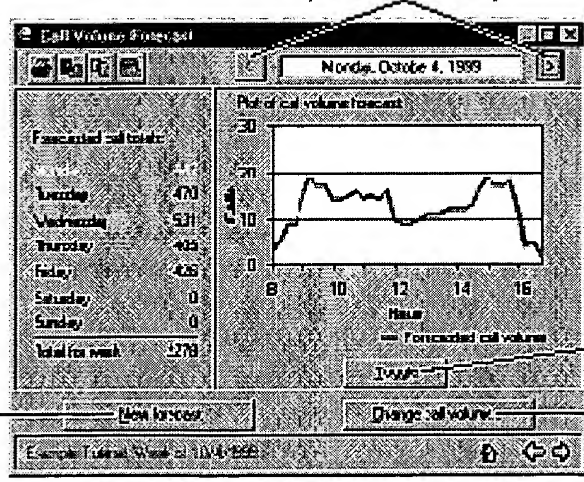
## FORECAST CALL VOLUMES

Once you've set up the call center's operating parameters and created a profile from the call volume historical data, you can use this information to forecast needs for the current week. First, you need to forecast the expected call volumes.

**1** On the Home screen, click on the Forecast tab to make sure it's on top.




**2** Click on the Forecast icon to open the Call Volume Forecast window.



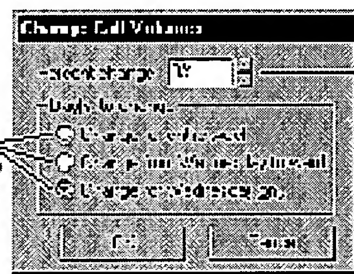
3 In the Call Volume Forecast window, you'll see that a forecast has already been generated for this week, with the call volume data for Monday displayed as a graph.

Click the *Toggle* button to display the data as a numerical table. Click *Toggle* again to return to the graph display.

4 Click the forward and back buttons at the top of the window to move forward or backward through the week and display the forecast call volumes for different days.

5 After reviewing a forecast, you may decide that the call volume needs to be revised—based on your own experience of similar weeks, on new information received, or on recorded call volumes for the first days of the week.

Click *Change call volume* to open the Change Call Volumes window.




6 In the Change Call Volumes window, you can click the up or down arrows by the *Percent change* box to specify a percentage increase or decrease in the volume. (Negative percentages indicate a decrease in volume.)

7 Once you set the percent increase or decrease, you can click one of the three radio buttons to apply this change to the entire week, to the rest of the week only (from the current day forward), or to the current day only.

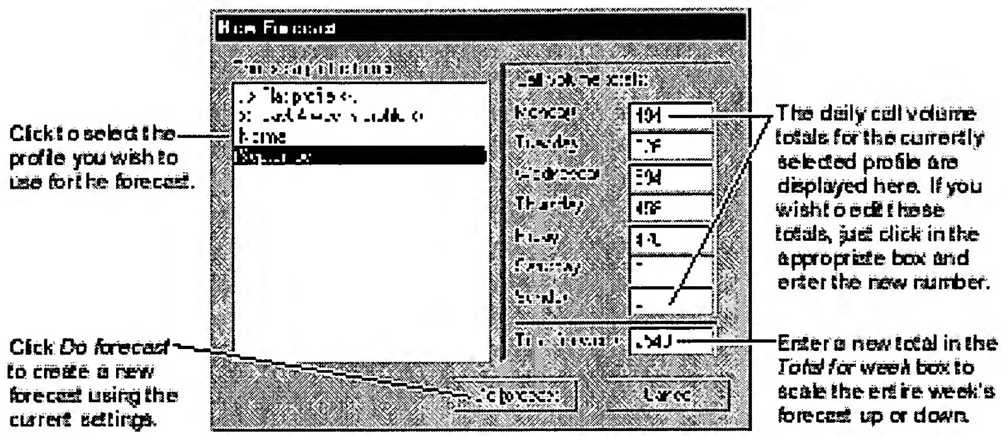
8 For this tutorial, leave the *Percent change* set to 0, and click *Cancel* to close the Change Call Volumes window.

## Create a new forecast

In PrimeTime, you can create new forecasts in order to explore the effects of using different call volume profiles and different assumptions about call volume growth.

To create a new forecast for this tutorial:

**1** In the Call Volume Forecast window, click *New forecast* to open the New Forecast window.




**2** On the left, the *Choose a profile to use* box displays the available call volume profiles.

For this tutorial, click on the *September* profile to select it and display its call volumes.

**3** On the right, the *Call volume totals* box displays the call volume totals, by day, for the current profile, plus the total for the week.

If you wish, you can edit the total for each day directly, to increase or decrease it. To edit a day's total, click on the day's total to select it, and then type in the new total you wish to use. To edit the week's total, click in the *Total for week* box to select it, and then type in the new total. (Note that when you change the week's total, the daily totals are scaled proportionally.)

For this tutorial, change the *Total for week* value to 2200.

**4** Click *Do forecast* to create a new call volume forecast, based on the profile selected and the totals shown.

**5** In the Call Volume Forecast window, click the *Home* button to return to the Home screen.

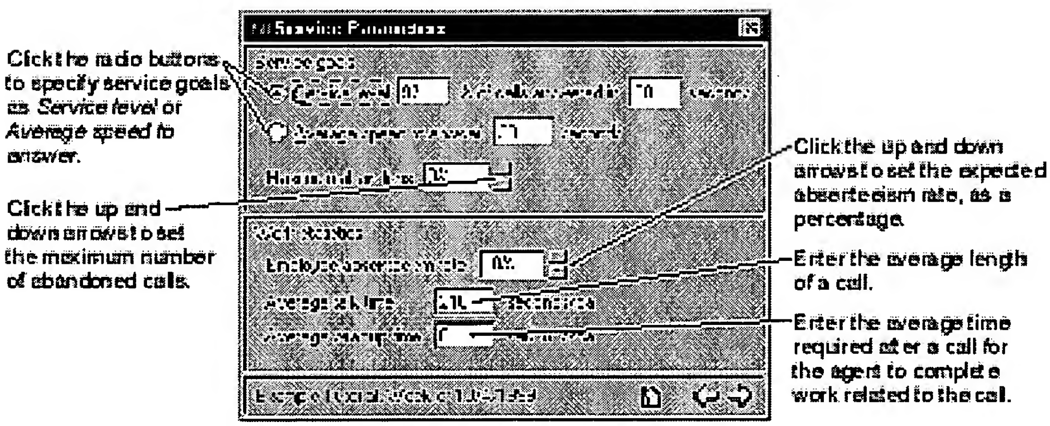
## SET SERVICE GOALS AND PARAMETERS

The next step is to specify your service goals and parameters—the level of service you want to provide in answering calls, the number of abandoned calls you expect, the average length of each call, and so forth. PrimeTime uses the goals and parameters that you set here, together with your call volume forecast, to predict how many call center agents will be required at various times during the day. And PrimeTime uses the agent requirements, in turn, to create schedules for your employees.

To set your service goals:

**1** On the Home screen, click the Forecast tab to make sure it's on top.

**2** Click the Service Parameters icon to open the Service Parameters window.




**3** In the *Service goals* section of the window, you set your service goals, using *Service level*, which specifies that a certain percentage of all calls be answered within a specified time, or using *Average speed to answer*, which specifies the average time to answer a call (when considering all calls).

For this tutorial, make sure that the *Service level* radio button is selected and that the level is set to *97% of calls answered in 20 seconds*.

**4** In the *Service goals* section, you can also set the percentage of abandoned calls you expect (that is, people who hang up before an agent answers).

For this tutorial, click the up and down arrows by the *Maximum abandons* box to set the percentage to 2%.

**Note** *The* Maximum abandons *value should be set to the percentage of abandons you* expect *to have, based on your historical data, rather than what you might* hope *to have. It's an estimate based on past performance, not a goal.*

5 In the *Work statistics* section, you set statistics related to your service goals, starting with the expected absenteeism rate (from sickness or other causes).

For this tutorial, make sure the *Employee absenteeism rate* setting is 10%.

6 The *Average talk time* is the average amount of time an agent spends on the phone with a caller.

For this tutorial, make sure the *Average talk time* is set to 210 seconds.

7 The *Average wrapup time* is the average amount of time an agent spends after the call to finish off any work related to the call.

For this tutorial, make sure the *Average wrapup time* is set to 0 seconds.

8 Click the *Home* button to return to the Home screen.

## DISPLAY AGENT REQUIREMENTS

Based on your call volume forecast and your service goals and parameters, PrimeTime can now predict your agent requirements—the number of people needed to answer calls at different times during the day.

To display the projected agent requirements:

1 On the Home screen, click on the Forecast tab to make sure it's on top.

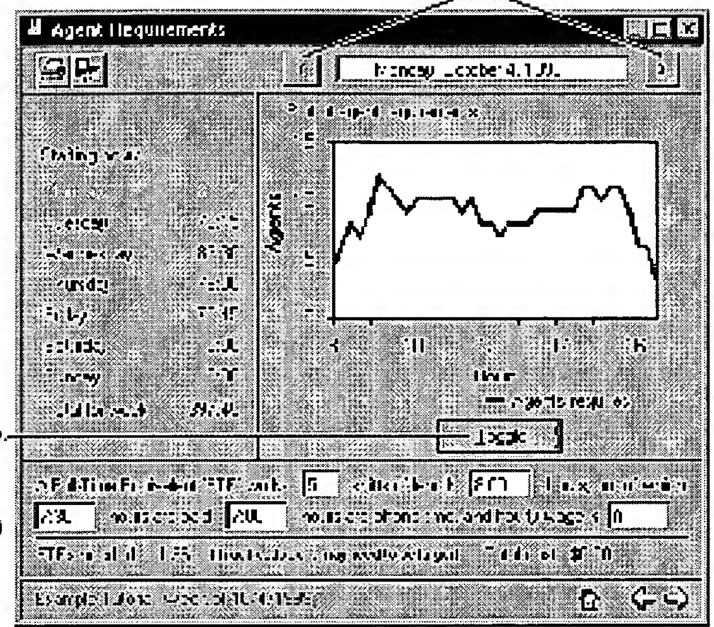
2 Click the Agent Requirements icon to open the Agent Requirements window.

3 In the Agent Requirements window, a graph displays the number of agents required to meet your predicted call volume and your service goals. The graph shows the required number of agents at 15-minute intervals, through the course of the currently selected day.

To view this information as a numerical table, click *Toggle*.

To return to the graph view, click *Toggle* again.

4 To view the requirements for other days, click the forward and back buttons at the top of the screen to select a different day of the week.




**5** This window also provides a simple FTE (full-time equivalent) calculator for your convenience. To calculate the FTEs based on the agent requirements, you can enter the appropriate numbers in this section.

**Note** *This calculator is for your convenience only. The numbers you enter here—and the results they provide—are not used elsewhere in PrimeTime and do not affect the schedule or other parts of the program. In addition, the FTE results provided are an estimate—the actual number of employees required may be higher.*

**6** Click the *Home* button to return to the Home screen.

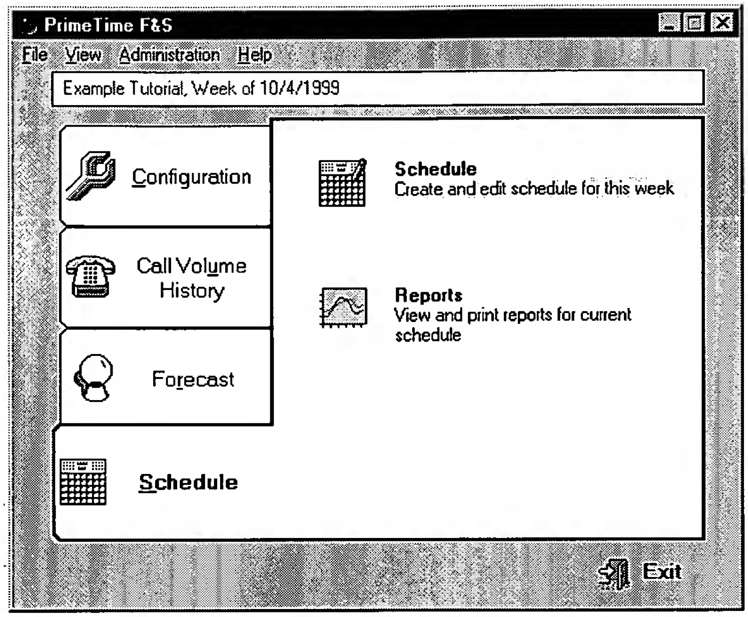
## MAKE A SCHEDULE

So far, you've entered the operating parameters for your call center (hours, shift patterns, employees), used your historical call volume data to create call volume profiles, and forecast agent requirements based on your service goals and your projected call volumes.

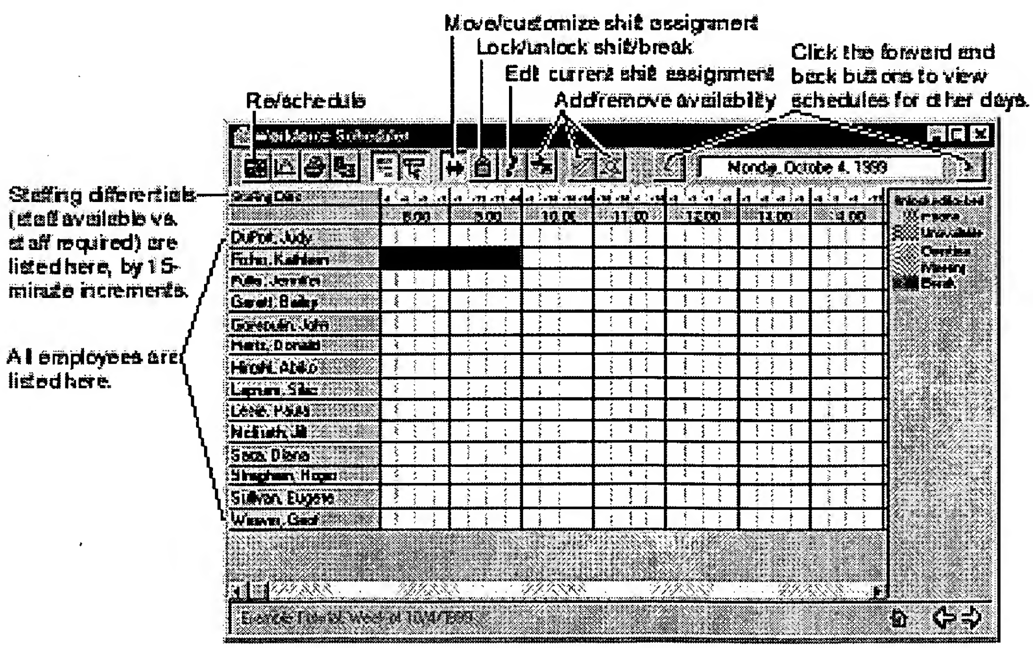
Now you're ready to create a schedule for the week that gives the best fit between your projected agent requirements and your available staff.

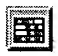
To make a schedule:

**1** On the Home screen, click on the Schedule tab to make sure it's on top.

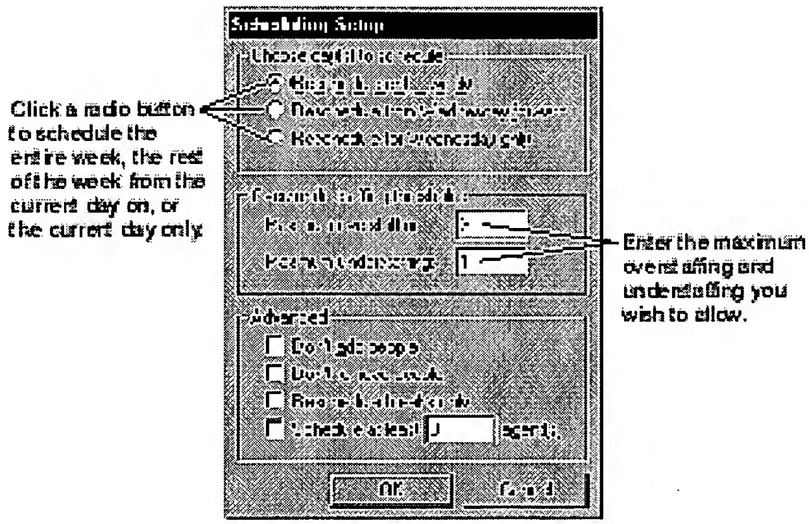



**2** Click on the Schedule icon to open the Workforce Scheduler window.





**3** If you haven't generated a schedule for this week before, the schedule section of the window will be blank. To create a schedule based on the current settings, click the *Re/schedule* button, located at the left end of the window's toolbar. PrimeTime opens the Scheduling Setup window.




**4** In the *Choose day(s) to schedule* section of this window, you can choose to schedule (or reschedule) the entire week, the rest of the week only (starting from the current day), or just the current day.

For this tutorial, click the radio button for *Reschedule entire week.*

**5** In the *Over/understaffing thresholds* section of this window, you specify how much variation from the projected agent requirements you wish to allow. Click in the *Maximum overstaffing* or *Maximum understaffing* box, and enter the level of overstaffing or understaffing you are willing to allow.

No matter what numbers you enter here, PrimeTime will try to achieve the exact staffing level required (no overstaffing, no understaffing) whenever possible. However, when it is unable to do so (because of the variation in call volumes during the day), then PrimeTime will rely on the overstaffing and understaffing thresholds you set here to create a schedule.

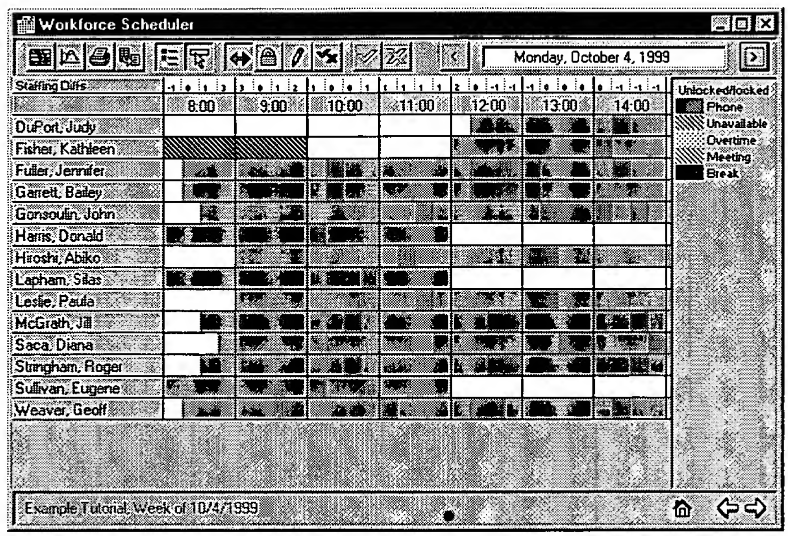
For this tutorial, make sure *Maximum overstaffing* is set to 3 and *Maximum understaffing* is set to 1. (These settings tell PrimeTime we'd rather be slightly overstaffed than understaffed.)

**6** In the *Advanced* section of this window, there are four options you can use to further restrict what PrimeTime does when it creates a schedule. To get

the most efficient schedule, you need to give PrimeTime as much leeway as possible, so it's generally best to avoid activating these options if possible.

For this tutorial, make sure none of these options is selected.

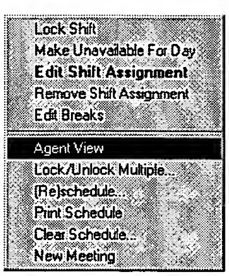
**7** Click *OK* to close the Scheduling Setup window. PrimeTime will create and display a schedule similar to the one shown below. In this screenshot, the dark gray areas are work times and the lighter gray areas are break times. (On your computer screen, you'll see these in color.)



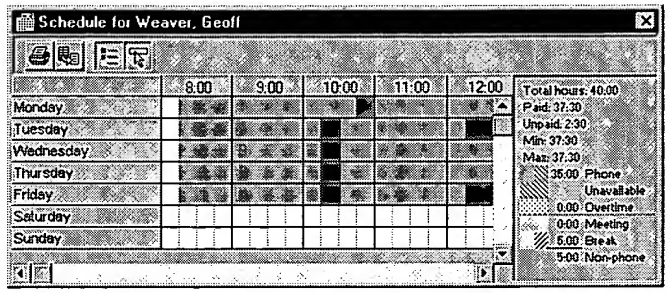

**8** The Workforce Scheduler window displays a lot of information and gives you a number of tools to work with, so take a moment to study the screenshots above and browse around in the actual window on your screen.

Note that as you move your mouse pointer over the tool buttons in the toolbar, PrimeTime displays a label giving the function of each tool.

**9** Use the forward and back buttons at the top of the window to view different days of the week. Notice how the schedule changes from day to day to suit the projected call volumes.




**10** To view the week's schedule for one particular employee, double-click the employee's name, or right-click anywhere on that employee's schedule, and then choose Agent View from the menu that appears. The Schedule window for that employee appears. (Click the close box in the upper right corner of the window to close it when you're done.)




**11** If you wish to print out the schedule, click the *Print* button on the toolbar.

## Edit a schedule

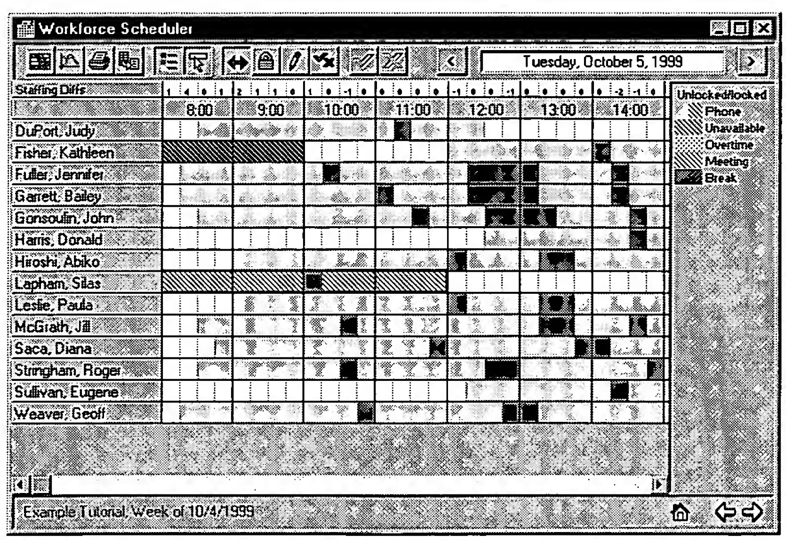
Using the tools available in the Workforce Scheduler window, you can do considerable editing of the schedule generated by PrimeTime—to account for specific employee requirements, for example. These tools are discussed in detail in Chapter 7, but here's a simple example of what you can do.

To edit the schedule:

**1** In the Workforce Scheduler window, use the forward and back buttons at the top of the screen to display the schedule for Tuesday.

**2** Click the *Move/customize shift assignment* tool on the toolbar to select it.

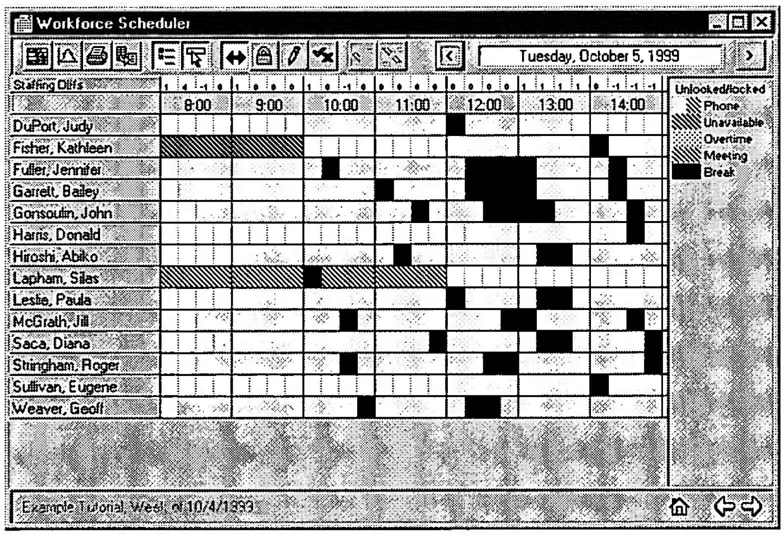
**3** Move the mouse pointer over Silas Lapham's shift (over his work time, not his break time), hold down the mouse button, and drag Lapham's shift assignment to the left so that it starts at 8:00 am. His shift will now be locked, and the schedule will look similar to the one shown below.



**4** Click the *Re/schedule* button on the toolbar to reschedule the day (since you've changed Lapham's schedule).

**5** In the Scheduling Setup window that appears, click the *Reschedule for Tuesday only* radio button, and then click *OK.*

**6** PrimeTime creates a new schedule for Tuesday only, similar to the one shown below. Take a look at the new schedule—PrimeTime has adjusted the shift assignments of other employees to account for the change in Lapham's shift assignment so that you still have an efficient schedule.




**7** When you're done, click the *Home* button to return to the Home screen.

## VIEW REPORTS

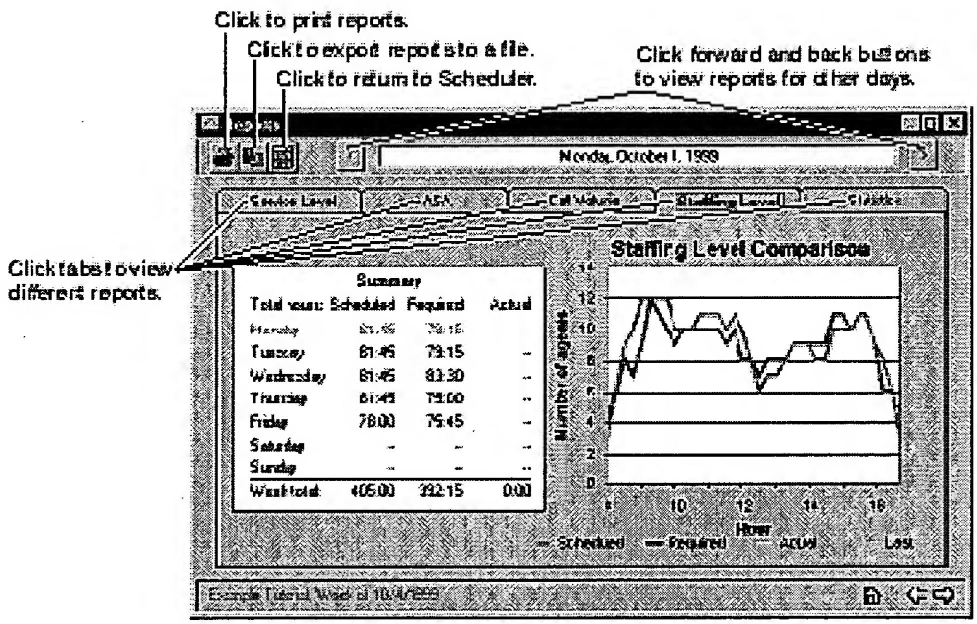
Once you've created a schedule for the week, you can view reports displaying the service level, average speed to answer, call volume, staffing level, and summary statistics. As data accumulates from your ACD, these reports will display your predicted or desired levels against the actual levels. By comparing the actual to the predicted, you can see how close you came to your predicted service level, how accurate your call volume forecast was, and so forth. From these comparisons, you can modify your schedule (and other parameters) to get a better fit for future days.

To view reports:

**1** On the Home screen, click on the Schedule tab to make sure it's on top.

**2** Click the Reports icon to open the Reports window.

As you browse through the Reports window, you can use the forward and back buttons at the top of the window to display reports for different days of the week.




**3** Click the Staffing Level tab to display a graph of the scheduled and the required staffing levels for the day.

**4** Click the Service Level tab to display a graph of the service level (percentage of calls answered within a specified time).

If you selected Service Level rather than ASA in your Service Goals (earlier in this tutorial), then the graph displays both the desired level of service and the predicted level. (If you selected ASA in your Service Goals, only the predicted level is displayed, since there is no target level for comparison.)

**5** Click the ASA tab to display a graph of the average speed to answer (average time it takes agents to answer a call).

If you selected ASA rather than Service Level in your Service Goals (earlier in this tutorial), then the graph displays both the desired level of service and the predicted level. (If you selected Service Level in your Service Goals, only the predicted level is displayed, since there is no target level for comparison.)

6 Click the Call Volume tab to display a graph of the actual and the forecast call volumes for the day. If you haven't entered any historical call volume data for this week, then only the forecast call volume is displayed.

7 Click the Statistics tab to display tables of summary statistics, including daily, weekly, and agent-by-agent totals for work hours (phone, non-phone, paid, unpaid, and overtime) and for over- and understaffing.

8 If you wish to print any of these reports, click the *Print* button on the toolbar.

9 As you view these reports, you'll no doubt see discrepancies between the actual levels and the projected or desired levels. If you wish to edit the schedule to try to get a better fit, click the *Show schedule* button at the top of the window to return to the Workforce Scheduler window.

10 When you have finished viewing reports, click the *Home* button to return to the Home screen.

## CHECK PERFORMANCE WITH PRIMETIME PULSE

In addition to the PrimeTime F&S reports, PrimeTime includes a separate application, named PrimeTime Pulse, that offers a different view of the performance of your groups.

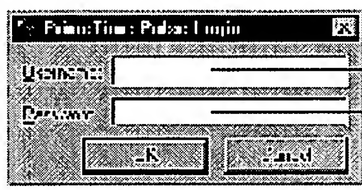
PrimeTime Pulse tracks performance for service level, AHT (average handling time—the total of the call time plus the wrapup time), ASA (average speed to answer), call volume, staffing, and abandoned calls. However, in addition to displaying your actual performance, PrimeTime Pulse displays the deviation of your actual performance from your required or predicted values. By collecting data throughout the day and highlighting these deviations, PrimeTime Pulse enables you to quickly analyze your performance at any point during the day and take corrective action when needed.

## Start PrimeTime Pulse

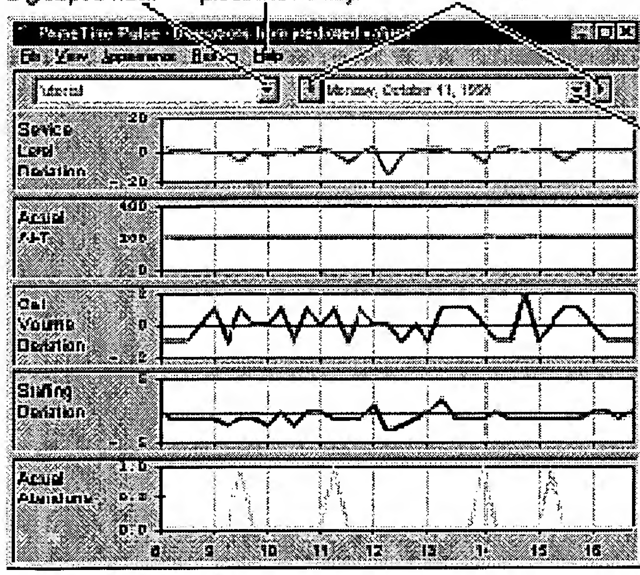
To start PrimeTime Pulse and begin this section of the tutorial:

1. Double-click the PrimeTime Pulse icon on your desktop, or choose PrimeTime Pulse from the PrimeTime folder on the Windows Start menu. (In Windows NT 3.51, double-click the PrimeTime Pulse icon in the Program Manager.)

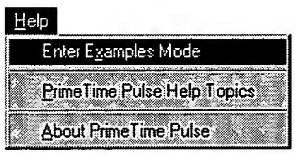
2. If you're using the multi-user version of PrimeTime, you'll see the PrimeTime Pulse Login window. Enter your username and password, and then click *OK*, just as you did earlier to log in to PrimeTime F&S. (In the single-user version, you won't see this window.)




3. PrimeTime Pulse will display its main window. By default, PrimeTime Pulse displays information for five of the six items, omitting either service level or ASA, depending on what you have chosen as your service goal in the Service Parameters window in PrimeTime F&S.



**Note** *Through PrimeTime Pulse's View menu, it's possible to change the number of items displayed. If someone else has changed the settings before you, you may see a different number of items when you start the program.*




4. Like PrimeTime F&S, PrimeTime Pulse has an Examples Mode that allows you to practice with preloaded data.

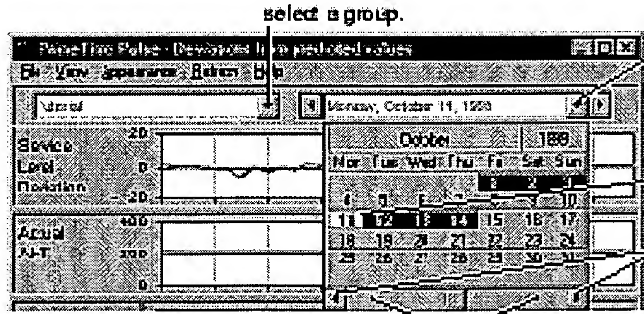
   To enter Examples Mode, choose Enter Examples Mode from the PrimeTime Pulse Help menu. When you are in Examples mode, the group and the date will appear in red as a reminder.

## Choose the group and week

Once you've started PrimeTime Pulse, you need to choose the group and week that you want to view.

To choose the group and week:

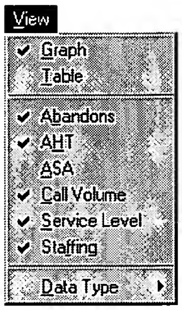
1. Click the arrow by the group box (at the upper left of the window), and choose *Tutorial* from the list.
2. Click the arrow by the date box to select a week to view. On the calendar that appears, use the horizontal scroll bar to move to October 1999, and then click on the 11th to select the week of October 11, 1999.




## Set the view options

Through its View menu, PrimeTime Pulse also allows you to select what information is displayed in the window and how it's displayed.

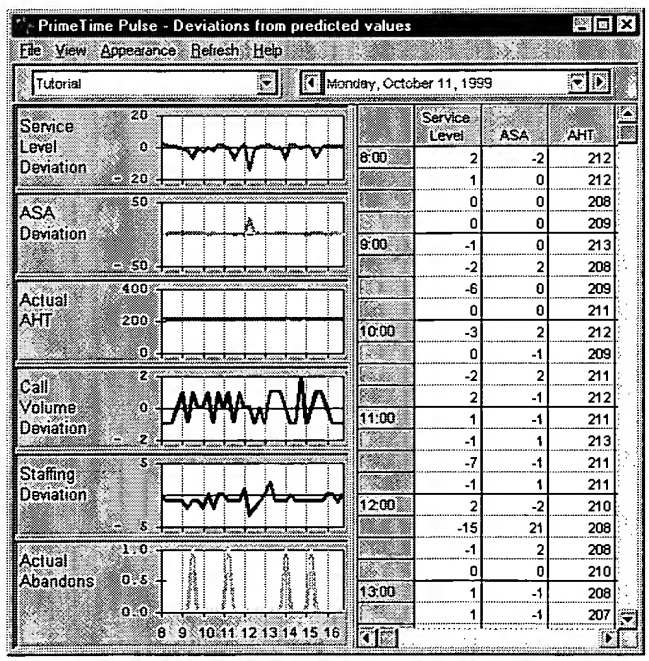
To set the view options:




**1** The View menu lists all six items for which PrimeTime Pulse can display information: Abandons, AHT, ASA, Call Volume, Service Level, and Staffing. The items that are checked on the menu will be displayed. To remove a checked item from the display, just select it from the menu—it will be unchecked and its graph will not be displayed. To return the unchecked item to the display, just select it from the menu again.

For this tutorial, make sure that all six items are checked.

**2** Through the View menu, you can also choose to view the information displayed as a set of graphs, as a table, or as both at the same time.




To add the graph or table view to the display, just select Graph or Table from the View menu so that the item is checked. To remove the graph or table view, just select the item again so that it is unchecked.

For this tutorial, make sure that Graph is checked and Table is unchecked so that the information is displayed as a graph only.

**3** Finally, through the View menu, you can select the type of data PrimeTime Pulse is to display—the deviations from your predicted values, the deviations from your required values, or the actual values. *Deviations from predicted values* show the difference between the actual numbers recorded in your call center and the numbers PrimeTime F&S predicted or scheduled, given the information on forecasts, staffing, etc., that you have entered.

*Deviations from required values* show the difference between the actual numbers and the service goals you've set or the numbers PrimeTime F&S says are required to meet those goals.

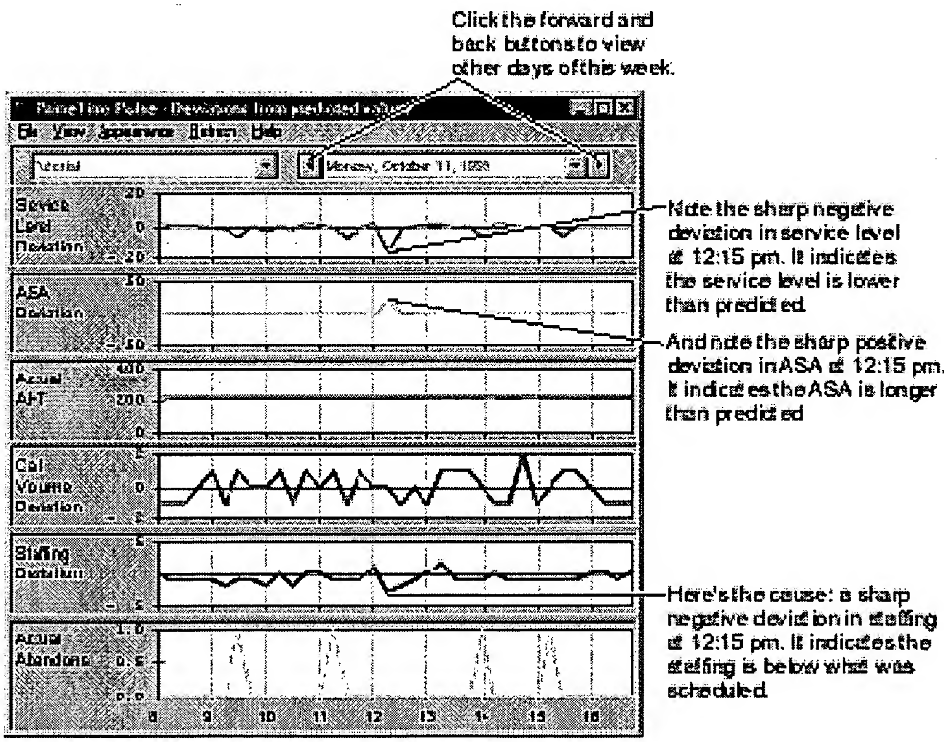
To select the type of data to be displayed, click on the View menu, point to Data Type, and select Deviations from Predicted Values, Deviations from Required Values, or Actual Values from the popup menu that appears.

For this tutorial, make sure that Deviations from Predicted Values is selected.

## Review call center performance

Now let's use PrimeTime Pulse to review the call center's performance during the week of October 11, 1999.

1 In PrimeTime Pulse, click the forward and back arrows by the date box to select Monday, October 11, 1999. The screen you see should be similar to the following:




The service level graph shows only minor deviations during most of the day, indicating that the actual service level is fairly close to the predicted service

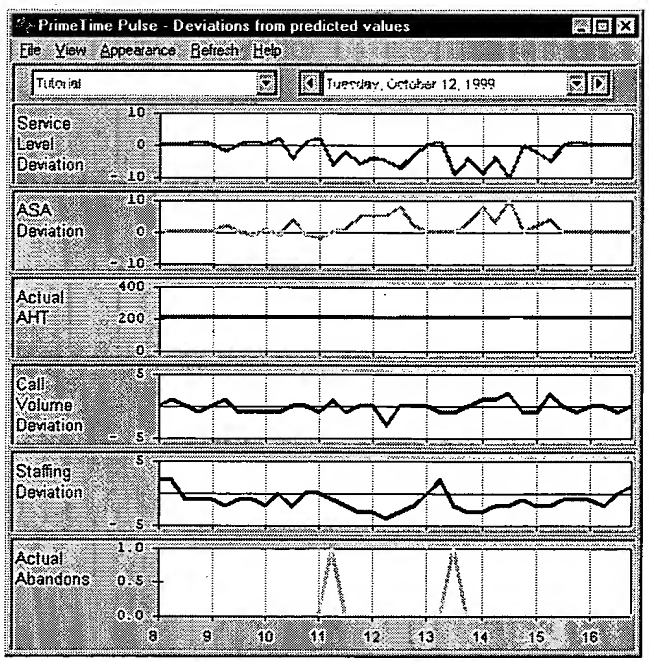
level. However, at 12:15 there's a sudden spike—a large negative deviation, which indicates that the service level suddenly dropped below the predicted level.

In the ASA (average speed to answer) graph, you can see a matching positive deviation at the same time, indicating that the average speed to answer is greater than predicted.

Even though it shows quite a few ups and downs during other parts of the day, the call volume graph shows no deviation at 12:15, indicating that the actual call volume matched the predictions at that time.

The staffing graph holds the key here—it shows a sudden negative deviation at 12:15, indicating that the call center was understaffed at that point. So when staffing dropped below the scheduled level, the ASA became greater than predicted and the service level became lower than predicted.

**2** Now click the forward button by the date box to display the graphs for Tuesday, October 12, 1999. The screen you see should be similar to the following:




Here the graphs show a situation similar to Monday, only it continues for a longer time, roughly from 11:00 through 15:30. Notice how the staffing, ASA, and service level graphs move more or less in synch through that

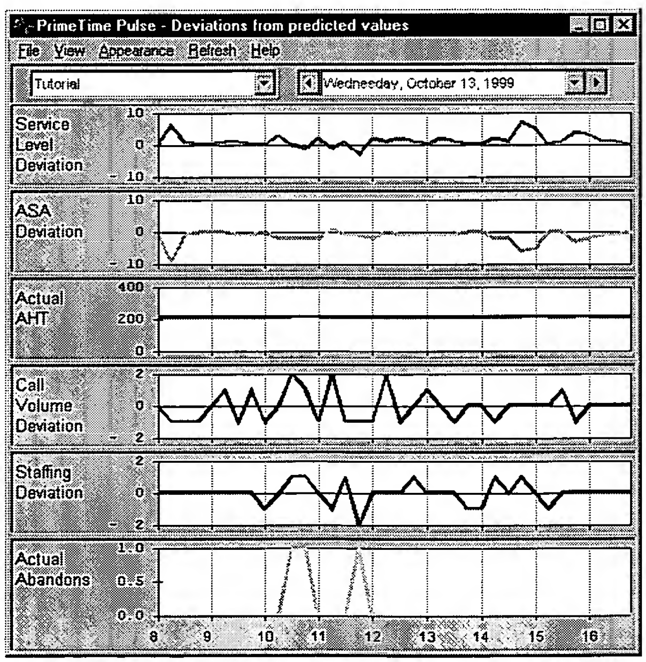
period. As the staffing graph drops, the ASA graph rises and the service level graph drops.

Notice that in the period from 14:00 to 14:30, as the staffing graph begins to climb back toward zero deviation, the service level and ASA graphs don't show a corresponding improvement. Why? The call volume graph shows that the call volumes are higher than predicted during that period.

**Tip**

> *When comparing graphs in PrimeTime Pulse, don't get caught up in comparing the amplitude of the graph spikes too literally. Note that the scale used will vary from graph to graph. In the previous screenshot, for example, the graph for ASA has a range from -10 to +10, while the graph for staffing has a range from -5 to +5. Also a negative deviation of one is unlikely to be significant in ASA, but it could be very significant in staffing.*

**3** Next, click the forward button by the date box again to move to Wednesday, October 13, 1999. The screen you see should look similar to the following:

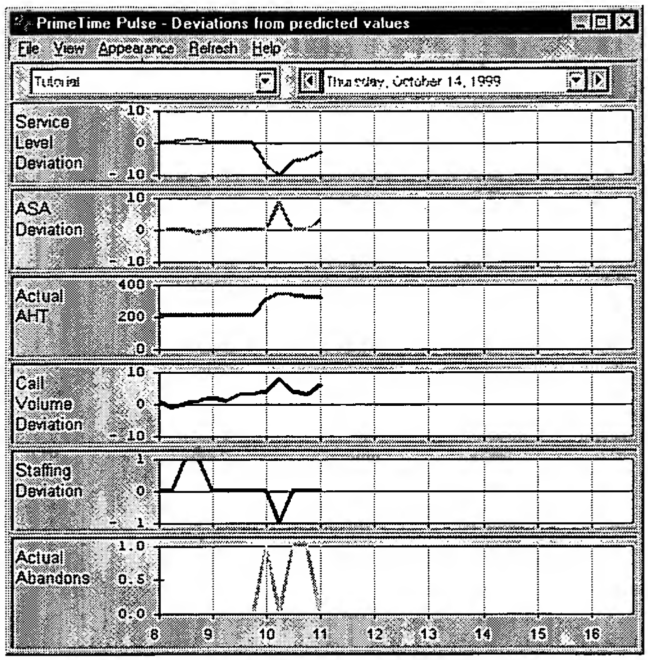



Here the service level graph shows a generally good day, with positive deviations (i.e., service level higher than predicted) at several points.

Notice that even though the staffing and call volume graphs show numerous ups and downs, these don't result in major changes in the service level and ASA graphs. In some cases, that's because a drop in the staffing graph

corresponds with a drop in the call volume graph. But notice also that on this screen, both the staffing and call volume graphs range only from -2 to +2, whereas on the previous day, they ranged from -5 to +5. So in fact, the deviations are not as severe as they might first appear to be.

4 Click the forward button again to move to Thursday, October 14, 1999. The screen you see should look similar to the following:




This day includes data only through 11:00 am and represents an example of what you might see as you monitor your call center performance during the current day.

The sudden drop in service level starting at 9:45 am certainly stands out, but what's the cause? Though the staffing graph shows a drop at 10:15, it shows zero deviation both before and after that one period.

But take a look at the call volume graph (and notice that it ranges from -10 to +10, not -5 to +5 as on the previous day). Also take a look at the Actual AHT (average handling time) graph. For the period from 9:45 on, both these graphs show strong upward movement, indicating a higher call volume than predicted and a longer average handling time. So more calls plus longer calls creates a lower service level, even though staffing is as scheduled during most of this time. Since you've discovered this problem at mid-day, though, you still have time to make changes to deal with the increased load.

**5** To exit Examples Mode and return to PrimeTime Pulse's regular mode, choose Exit Examples Mode from the Help menu.

## WHAT'S NEXT?

If you want to practice some more with PrimeTime F&S and PrimeTime Pulse, just work through the tutorial again, and try making different choices and selections as you go to see how the resulting forecasts and schedules change. Don't be afraid to play around with the sample data to see what happens—you can't save permanent changes to the tutorial data, so you'll always be able to start again with the original data.

If you want to learn more about specific PrimeTime F&S options and commands, read through Chapter 4 through 7 and 9, which cover these in more detail. For more detailed information on PrimeTime Pulse, see Chapter 8.

And if you want to jump right in and start using PrimeTime, please do! PrimeTime's Wizard view will guide you through the steps, and you can get online help at any time by pressing the F1 key or clicking on the Help menu on the Home screen.

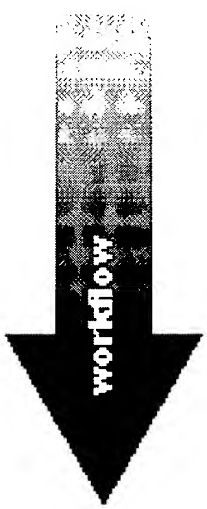
## Chapter 4

# Getting Started with PrimeTime

This chapter explains how to get around in PrimeTime and includes the following sections:

- **Overview of PrimeTime**: A brief introduction to PrimeTime's structure and workflow and to its four main modules (Configuration, Call Volume History, Forecast, Schedule).
- **Multi-user vs. single-user PrimeTime**: A brief overview of the differences between the multi-user and single-user versions of PrimeTime.
- **Help**: Getting help, finding version and license information, and using Examples Mode.
- **Navigation**: Starting and quitting PrimeTime, selecting the group and week to work with, and moving to different functions through Wizard view or Instant Access view.
- **View settings**: Changing view settings, which control aspects of your working view in PrimeTime.

## OVERVIEW OF PRIMETIME




PrimeTime's primary functions are arranged into four modules, designed to reflect the normal workflow and tasks required to schedule a call center.

| Module | Tasks |
|---|---|
| **Configuration**<br>*(Entering info about your call center operation. Covered in Chapter 5.)* | Enter call center work days and hours.<br>Enter information for 24-hour operation, if required.<br>Enter shift and break patterns, including lengths and start times.<br>Enter employee information, including availability. |
| **Call Volume History**<br>*(Creating profiles of daily and weekly call volumes from call volume historical data. Covered in Chapter 6.)* | View or enter historical call volume information (from call center ACD).<br>Using historical call volume data, create profiles (statistical models) to forecast future call patterns and volumes. |
| **Forecast**<br>*(Forecasting call volumes and agent requirements. Covered in Chapter 6.)* | Forecast call volumes, based on chosen call volume profile.<br>Set service goals, such as average speed to answer.<br>Forecast agent requirements based on projected call volumes and service goals. |
| **Schedule**<br>*(Creating schedules and reports. Covered in Chapter 7.)* | Make weekly schedule, based on employee availability, shift patterns, and agent requirements.<br>View reports for service goals, call volume, staffing level, and other statistics to show actual vs. required or predicted performance. |

When you first set up PrimeTime for your call center—or when you open a new call center—you'll probably work straight through the tasks in all four modules shown above, working from top to bottom. As you work through the tasks in each module, the information you enter and the decisions you make become the basis for later projections and eventually for your schedule.

As you continue to work with PrimeTime, you'll probably spend most of your time in the Forecast and Schedule modules, creating weekly call volume forecasts and generating weekly schedules and reports, while occasionally returning to the Configuration and Call Volume History modules to enter or revise call center information.

## PRIMETIME MULTI-USER AND SINGLE-USER

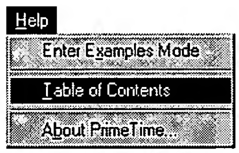
PrimeTime is now available in both single- and multi-user versions. The single-user version is intended to be installed on a single computer and used by one person at a time. The multi-user version is intended to be installed on a network, with PrimeTime server installed on one computer and PrimeTime clients installed on other computers on the same network.

The two versions have identical functionality except for those additions to the multi-user version required for multi-user operation (such as network installation, user login, and user access privileges).

| Multi-user PrimeTime | Single-user PrimeTime |
|---|---|
| Network installation, with one PrimeTime server and multiple PrimeTime clients. | Single computer installation. |
| PrimeTime clients access PrimeTime server database over network. | PrimeTime accesses database on local hard disk only. |
| Username and password required for login. | No login required. |
| Administrator can restrict user access to some or all groups, if desired. | No access or read/write restrictions. |
| Multiple users can open same group and week, but only one user at a time can have read/write access. | Only one user at a time can use PrimeTime. |

Throughout these chapters, all instructions apply to both the single- and multi-user versions, unless otherwise noted.

# HELP




To get online help at any time while using PrimeTime, just press the F1 key, or choose Table of Contents from the Help menu on the Home screen.

## Finding version and license information

To find the version number of your current copy of PrimeTime, or to find or update your PrimeTime license information, choose About PrimeTime from the Help menu on the Home screen.

## Using Examples Mode

PrimeTime offers a special Examples Mode for you to use while learning PrimeTime or exploring its features. Examples Mode provides sets of sample data for you to work with, including the Tutorial group data used in Chapter 3, as well as other groups with different sample data. For more information on the sample data provided in Examples Mode, see the descriptions in Appendix B of this guide or in the PrimeTime online help.

To enter Examples Mode, choose Enter Examples Mode from the Help menu on the Home screen. PrimeTime will display the Change Week/Group window so that you can select an example group and week to work with. The Home screen status box will then display the selected group and week in red to indicate that you are in Examples Mode and will not be able to save any changes you make.

To select a different group or week while in Examples Mode, choose Change Week/Group from the Administration menu on the Home screen.

**Note** *While you are in Examples Mode, you can make changes to the sample data, but you cannot save those changes. The changes you make will last only for the current session.*

To exit Examples Mode and return to PrimeTime's normal working mode, choose Exit Examples Mode from the Help menu. PrimeTime will display the Change Week/Group window so that you can select a regular group and week to work with. The Home screen status box will then display the selected group and week in black rather than red, to indicate that you can once again save changes.

## NAVIGATION

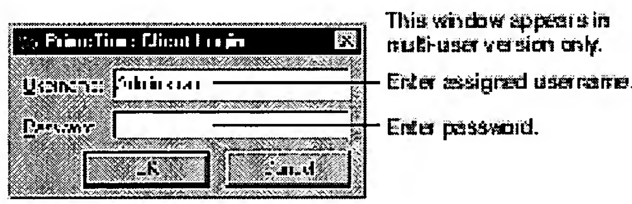
PrimeTime is designed to be easy to use and easy to navigate so that you never have to wonder where to find a particular function or what step to take next.

### Starting PrimeTime

PrimeTime F&S

To start PrimeTime, double-click the PrimeTime icon on your desktop, or choose PrimeTime from the Windows Start menu. (In Windows NT 3.51, double-click the PrimeTime icon in the Program Manager.)

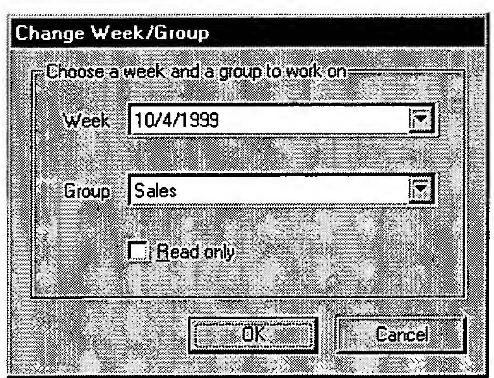
If you're using the multi-user version of PrimeTime, you'll first see the Client Login window. (In the single-user version, you won't see this window.)




Enter your username and password, and then click *OK*. (Usernames and passwords can only be assigned by the PrimeTime Administrator account.

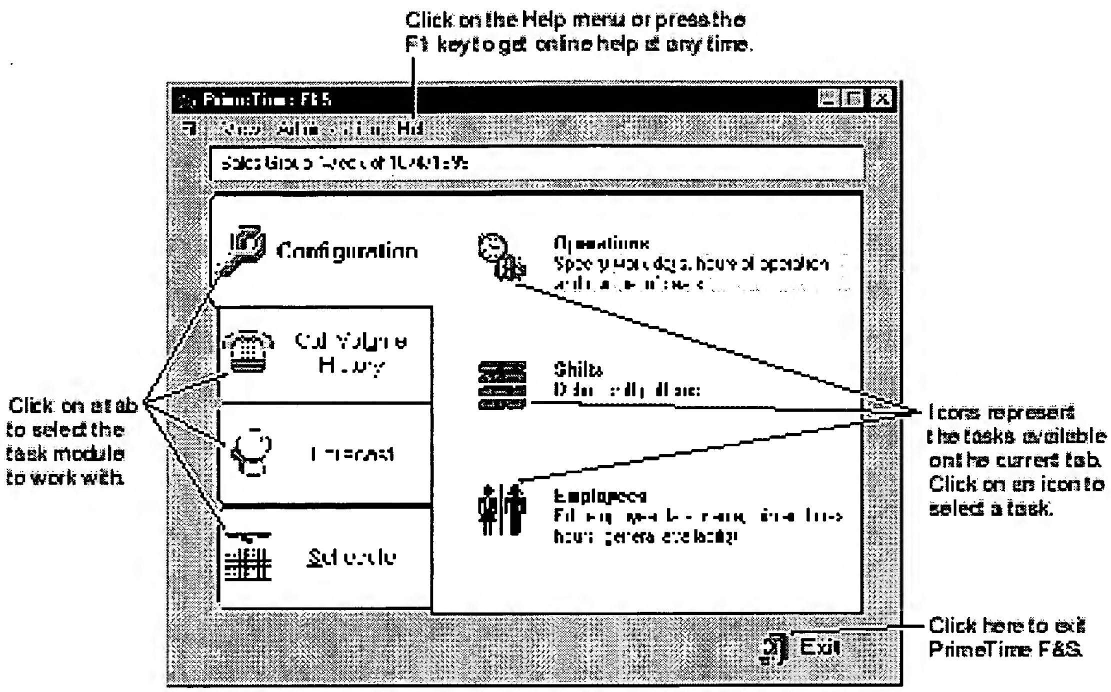
**Note** *PrimeTime Administrator: If you have not yet created any user accounts, see "Manage PrimeTime users" in Chapter 9 for instructions.*

Next, in both the multi-user and single-user versions, PrimeTime will display the Change Week/Group window so that you can select a group and a week of data to work with.




This window is the same in both the multi-user and single-user versions, except that the multi-user version has a *Read only* option, as shown here. See the following section, "Selecting the week and group," for detailed instructions on

using the Change Week/Group window. Once you've selected an initial week and group, click *OK*. PrimeTime will then take you to the Wizard view Home screen, where you'll start most of your work.




## Selecting the week and group

PrimeTime stores its data by weeks so that each week is a separate database. Within each week, you work with your data to set hours of operation and employee availability, forecast call volumes and agent requirements, create schedules, and so forth.

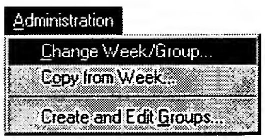
**Note** *When you move to a new week (one that has no data entered), PrimeTime will prompt you to choose a week from which to copy data. Any changes you make to a future week—such as adding a new employee, for example— will not affect current or past weeks.*

PrimeTime also allows you to define different groups to schedule. For example, if you have both a sales call center and a technical support call center, you would define a separate group for each one. Each group contains its own set of weeks and its own separate data—days and hours of operation, employee information, shift patterns, call volume histories, schedules, and so forth.

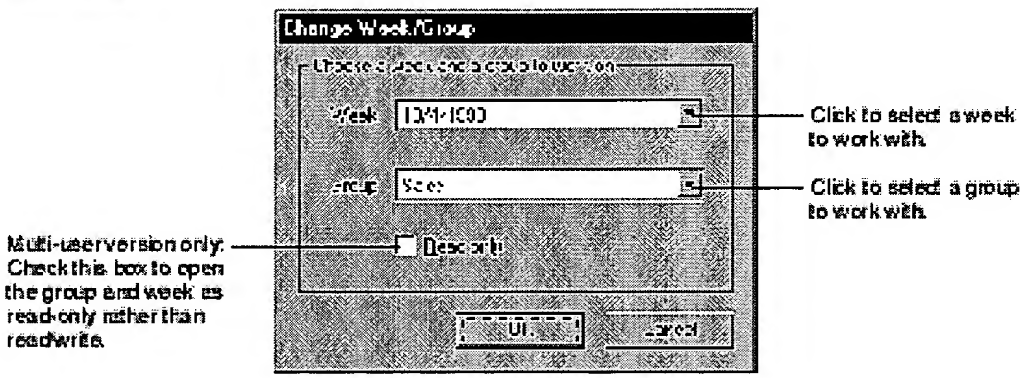
As a result, when you work with PrimeTime, your first need to select the week and the group you want to work with.

To select the week and the group:

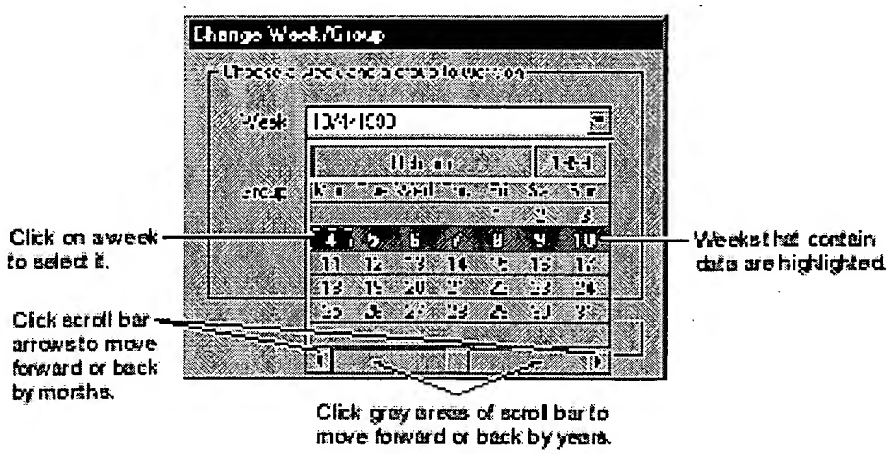
**1** If PrimeTime is not already running, launch PrimeTime. PrimeTime will display the Change Week/Group window so that you can select a week and group to start with.



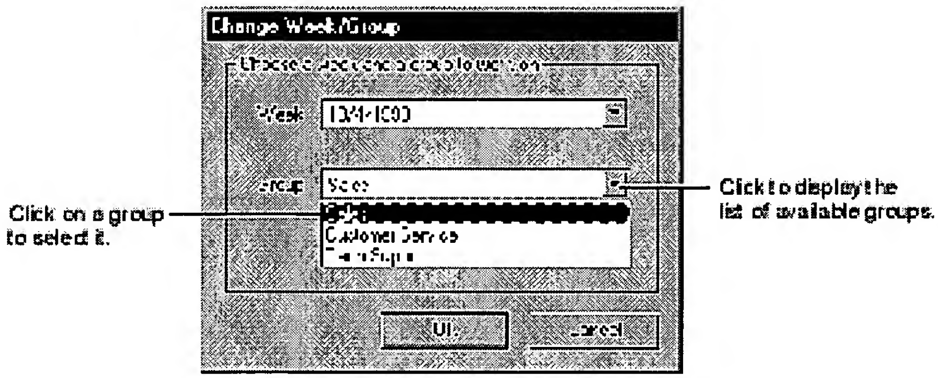

If PrimeTime is already running, and you want to choose a new week or group, choose Change Week/Group from the Administration menu on the Home screen to display the Change Week/Group window.




**2** Click the arrow by the *Week* box to select a week to work with. PrimeTime will display a monthly calendar with the weeks that already contain data highlighted. Use the horizontal scroll bar to move forward and back by months or years. Click on a week to select it.



**3** Then click the arrow by the *Group* box to display the list of available groups, and choose a group from the list.




**4** If you're using the multi-user version of PrimeTime, the Change Week/Group window also includes a *Read only* option. (This option does not appear in the single-user version.)

If you check this box, PrimeTime will open the selected group as read-only—that is, you'll be able to view data, but you won't be able to make changes. If you leave this box unchecked, PrimeTime will open the group as read/write, which will allow you to make and save changes. If you try to open a group as read/write when another user already has it open for read/write, PrimeTime will alert you and will open the group as read-only.

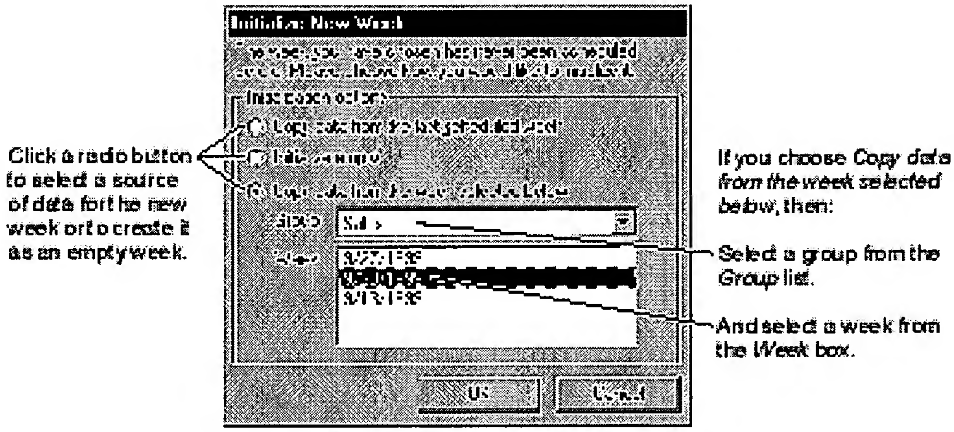
See the following section, "To open a group as read-only or read/write," for more information on this option.

**5** Click *OK* to close the Change Week/Group window.

**Note** *PrimeTime requires that you have at least one group. If you don't have any groups defined when you run PrimeTime (as when you run it for the first time, for example), it will ask you to create a group. You can rename or delete this group later, if you wish.*

**6** If the week you've selected has never been scheduled before, the Initialize New Week window appears. Click the appropriate radio button to select one of three ways to initialize the new week:

- *Copy data from the last scheduled week* to use the data from the most recent week that has a schedule.
- *Initialize empty* to create the week without data.
- *Copy data from the week selected below* to select a specific week to copy the data from.




**7** If you choose *Copy data from the week selected below*, first click the arrow by the *Group* box to display the list of available groups, and choose a group from the list. Then click on a week in the *Week* box to select it.

**8** Click *OK* to close the Initialize New Week window.

### *To open a group as read-only or read/write*

In the multi-user version of PrimeTime only, you can open a group either as read/write or as read-only. If you open a group as read/write, you will be able make and save changes, just as in the single-user version. On the other hand, if you open a group as read-only, you will be able to view the data, but you won't be able to make changes. Only one user at a time may have a particular group open as read/write in order to make changes, but any number of users may have the same group open as read-only to view the data.

**Tip**

> *Why open a group as read-only instead of read/write? For efficient work in a multi-user environment, it's important to be a "good network citizen" and not hog shared resources. If you're not planning to make changes, then open a group as read-only, leaving the way clear for someone else to open the group as read/write to make changes. If you later discover that you do need to make changes, choose Get for Write from the File menu on PrimeTime's Home screen to open the group as read/write (if it's available).*

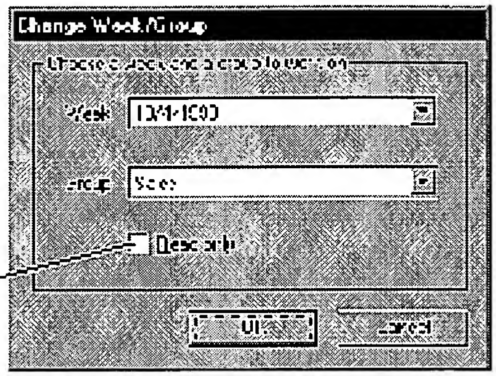
To open a group as read-only or read-write:

**1** Open the Change Week/Group window by choosing Change Week/Group from the Administration menu on the Home screen.

**2** Select the group you want to open, as described in step 3 of the previous section.

**3** In the Change Week/Group window, check the *Read only* box to open the group as read-only. Leave the box unchecked to open the group as read/write.

Multi-user version only. Check this box to open the selected group and week as read-only rather than read/write.



The *Read only* box will be checked and grayed out if you don't have read/write privileges for the group or if you are in Examples Mode.

The *Read only* box will automatically be checked (and grayed out so that you can't change it) when:

- You have not been assigned read/write privileges for that group by your PrimeTime Administrator.
- You are in Examples Mode.

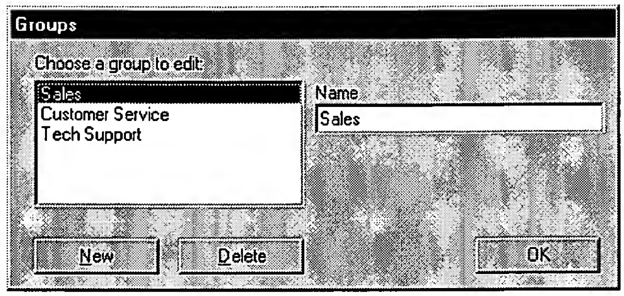
**Note** *Access privileges for PrimeTime groups are assigned through the PrimeTime User Manager, as described in the section "Manage PrimeTime users" in Chapter 9. Only someone with access to the PrimeTime Administrator account can assign access privileges.*


**4** If you have a group open as read-only but decide you want to open it as read/write so that you can make changes, choose Get for Write from the File menu on the Home screen. If no one else has the group open for read/write, and if you have read/write privileges for the group, then PrimeTime will reopen the group for you as read/write.

### *To create, rename, or delete a group*


To create a new group or delete an existing one:

**1** On the Home screen, choose Create and Edit Groups from the Administration menu. The Groups window appears.




2 In the Groups window, click *New* to create a new group, and enter the name you want to use for the group in the *Name* box.

When you create a new group, it is completely blank, with no operations information, employee information, or call volume information.

3 To rename a group, click on the name of the group in the *Choose a group to edit* box to select it, and then type a new name in the *Name* box.

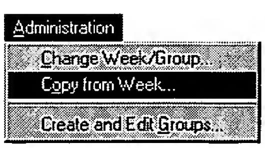
4 To delete a group, click on the name of the group in the *Choose a group to edit* box to select it, and then click *Delete*.

**Note** *Only the PrimeTime Administrator account can delete groups.*

*When you delete a group, you delete any information you have entered for that group, including employee information, call volume histories, and schedules.*

### *To copy data from another week*

At times, you may want to copy the data from one week into another week, in order to avoid having to enter all the data from scratch. You can copy data into the current week from any week within any available group by using PrimeTime's Copy from Week command.

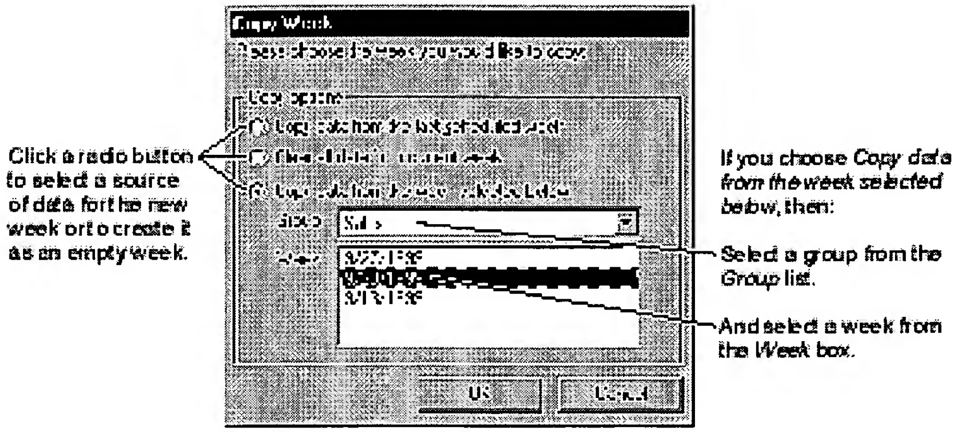



To copy data into the current week from another week:

1 On the Home screen, choose Copy from Week from the Administration menu.

2 In the Copy Week window that appears, you can choose one of three options:

- *Copy data from the last scheduled week* to use the data from the most recent week that has a schedule.
- *Clear all data from the current week* to wipe the current week clean.
- *Copy data from the week selected below* to select a specific week to copy the data from.

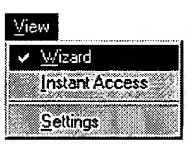



3 If you choose *Copy data from the week selected below*, first click the arrow by the *Group* box to display the list of available groups, and choose a group from the list. Then click on a week in the *Week* box to select it.

4 Click *OK* to copy the data and close the window, or click *Cancel* to close the window without copying any data.

**Note** *When you copy data from another week into the current week, you lose all the data previously entered in the current week.*

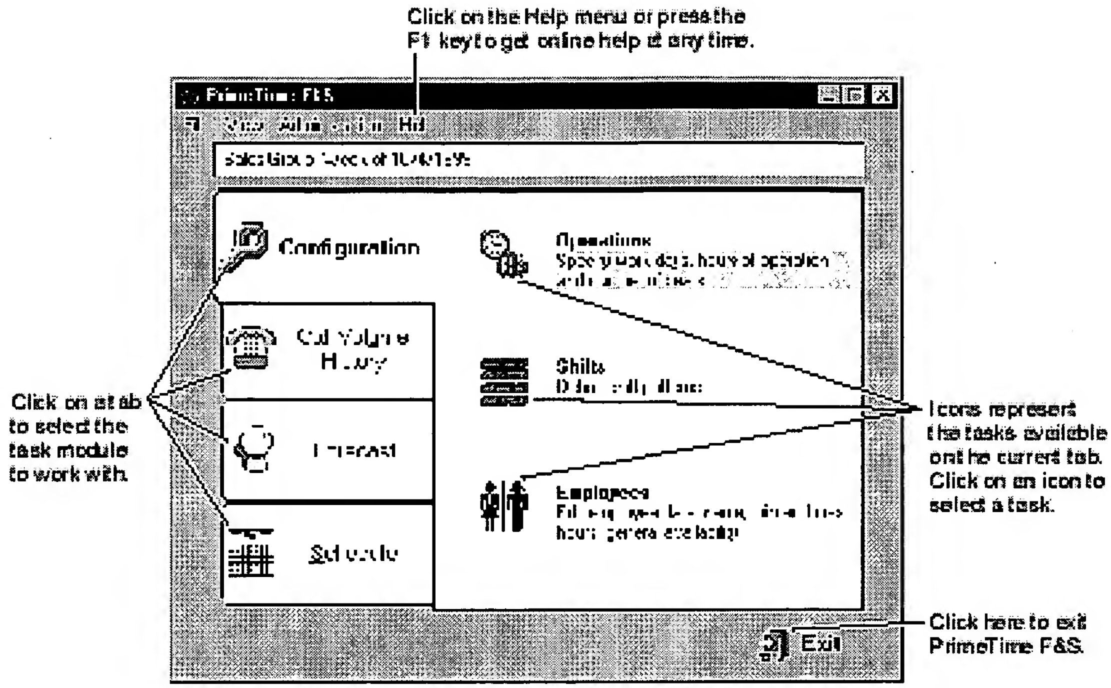
### Navigating in Wizard view



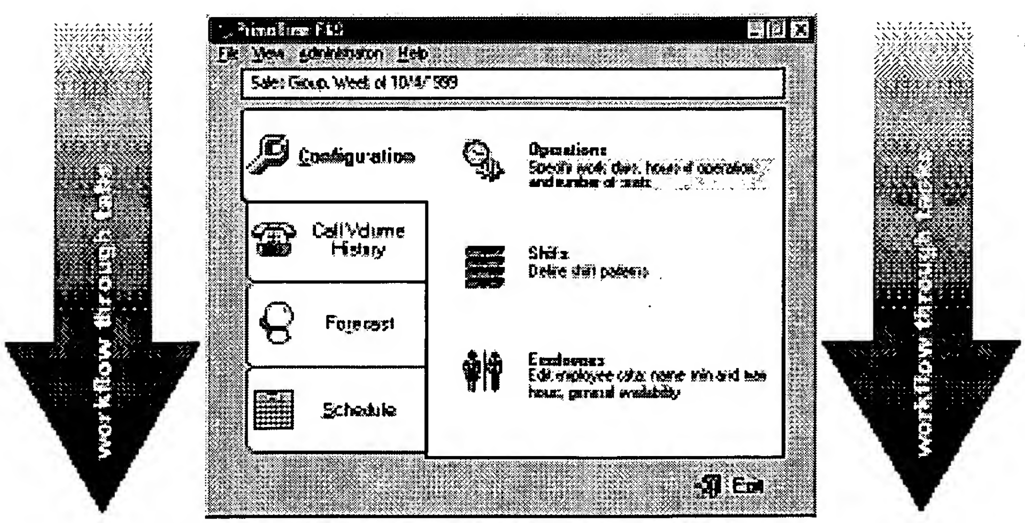

When you launch PrimeTime, it displays the Home screen. If the Wizard view is not currently selected, choose Wizard from the Home screen's View menu.

PrimeTime's Wizard view is organized to reflect the normal workflow of call center scheduling. It is designed to make all PrimeTime functions easily accessible and, at the same time, help lead you through the steps of scheduling your call center.

Click on a tab to select one of the four modules to work in—Configuration, Call Volume History, Forecast, or Schedule. Once you've selected a tab, click on the tab's task icons to select a specific task within that module.



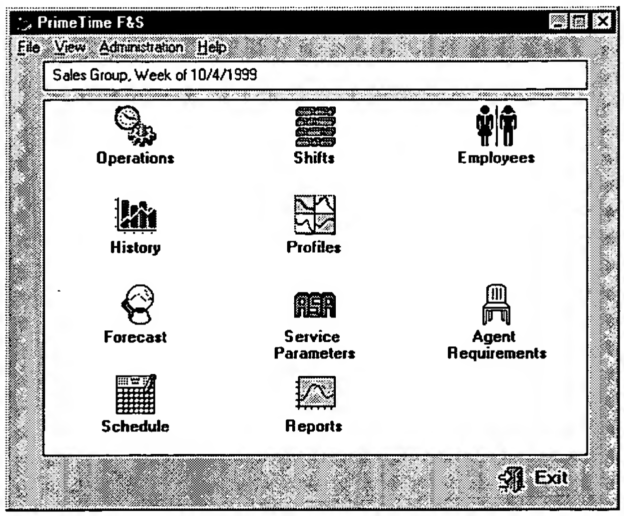

The key to navigating the Wizard view is that the normal workflow moves from top to bottom. When first setting up your call center in PrimeTime, you'd normally work through the four tabs starting at the top (Configuration) and working through to the bottom (Schedule). And on each tab, you'd also work through the task icons from top (Operations, on the Configuration tab) to bottom (Employees, on the Configuration tab), and then move on to the next tab.



## Navigating in Instant Access view


PrimeTime also offers an Instant Access view for expert users. Once you're thoroughly comfortable using PrimeTime, you can switch to Instant Access view by choosing Instant Access from the Home screen's View menu.

Instant Access provides direct access to all the PrimeTime task icons on a single screen, without the tabs of the Wizard view, in order to let experienced users move around quickly and efficiently. Just click on any icon on the screen to select a task to work on.




**Tip**

> *To speed access even further, Instant Access view allows you to have multiple task windows open at the same time. You can, for example, have the Employee Editor window and the Workforce Scheduler window open at the same time so that you can add new part-time agents to improve scheduling without having to close the Scheduler window.*
>
> *By contrast,. Wizard view is designed to avoid screen clutter by closing each task window when you return to the Home screen or move to a new task (except for the Workforce Scheduler and the Reports windows, which can be open at the same time).*

## Navigating with Home, Next, and Previous

To speed navigation in both the Wizard and Instant Access views, each main task window has a set of three navigation buttons—*Home*, *Next task*, and *Previous task*—at the bottom of the window.

Click the *Home* button to close the current window and return to the Home screen.

Click the *Next task* (right arrow) or *Previous task* (left arrow) buttons to move directly to the next or previous task window without returning to the Home screen. In both Wizard view and Instant Access view, clicking the *Next task* or *Previous task* button closes the current task window before opening the new one.

# VIEW SETTINGS

PrimeTime allows you to change your working view through several options:

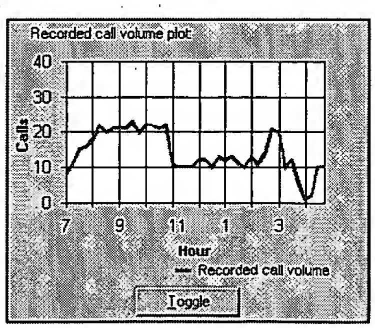
- Selecting Wizard view or Instant Access view for the Home screen.
- Adding horizontal and/or vertical graph lines to graph displays.
- Customizing the break types used in shift patterns.
- Adding a last saved data line to report graphs.

## Selecting Wizard or Instant Access view

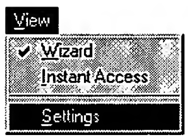
To switch between Wizard view and Instant Access view, choose the view you want from the View menu on the Home screen. (PrimeTime starts up in the view selected when you last quit the program.) See the beginning of this chapter for more information on the Wizard view and Instant Access view.

## Adding graph lines

For easier reading, you can add horizontal and vertical graph lines to all PrimeTime graph displays. For example, if you add both horizontal and vertical graph lines to the Recorded Call Volume graph, it will look like this:

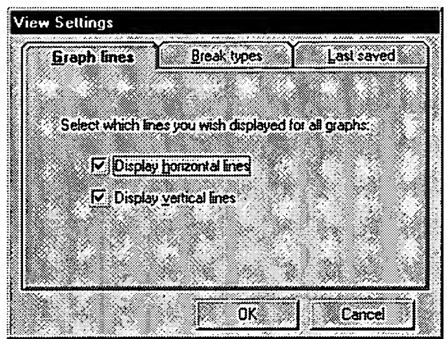


To add horizontal and/or vertical graph lines:




1. From the View menu on PrimeTime's Home screen, choose Settings. The View Settings window appears.
2. Click the *Graph lines* tab to select it.
3. You can add horizontal lines, vertical lines, or both.

   To add horizontal lines to each graph, click the *Display horizontal lines* checkbox. To add vertical lines to each graph, click the *Display vertical lines* checkbox.



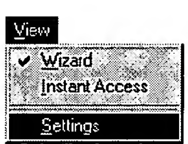

4. Click *OK* to close the View Settings window.

Once selected, these graph lines will appear on all graph displays in PrimeTime.

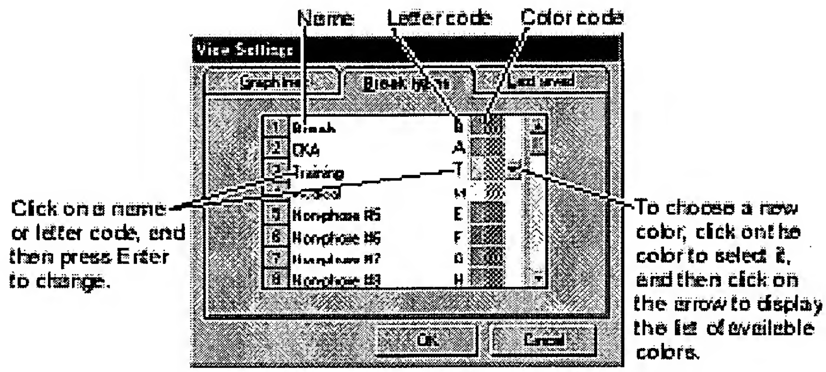
## Customizing break types

When you add a break to a shift pattern, you can select the type of break from a list in the Edit Breaks window. (See "Editing breaks" in Chapter 5.) PrimeTime defines 10 different break types, each with its own name, letter code (for use in printouts), and color code (for use in screen display). You can change the name, letter code, and color code of any break except the first one.

To change the name, letter code, or color code of a break:




1. From the View menu on PrimeTime's Home screen, choose Settings. The View Settings window appears.
2. Click the *Break types* tab to select it.
3. To change a break name or letter code, click on the name or letter code to select it and then type in the new name or letter code.




**4** To change a color code, click on the color code to select it, click on the down arrow next to the color to display the list of available colors, and then choose a new color from the list.

**5** Click *OK* to close the View Settings window.

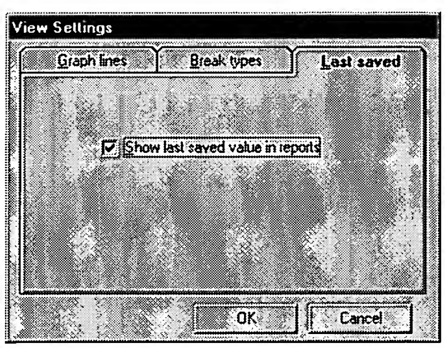
## Adding a last saved data line

To graphically display improvements in your scheduling, you can also add a "last saved data" line to the PrimeTime report graphs. This option adds a line to display the appropriate data from the last saved schedule to each report, allowing you to easily check for improvement.

To add the "last saved data" line to reports:


**1** From the View menu on PrimeTime's Home screen, choose Settings. The View Settings window appears.

**2** Click the *Last saved* tab to select it.



**3** Click the *Show last saved value in reports* checkbox.

**4** Click *OK* to close the View Settings window.

Note that this setting applies only to reports. Graph displays in other sections of PrimeTime are not affected.

## Chapter 5

# Configuring Call Center Information

This chapter explains how to configure PrimeTime with your call center information, such as hours of operation and number of seats, shift patterns and start times, and employee availability. It includes sections on:

- **Operations information**: Entering number of seats and days and hours of operation, and setting up for 24-hour operation.
- **Shift pattern information**: Entering information on shift patterns, start times, and break times.
- **Employee information**: Entering or importing employee information.


To enter the Configuration module of PrimeTime, click the Configuration tab on the Home screen in PrimeTime's Wizard view. In the Configuration module, you enter the basic operational parameters for your call center, including days and hours that your call center is open, number of seats in your call center, days that your employees are available, and so forth. Here you also enter information about 24-hour operation, if required for your call center.

The Configuration module is divided into three tasks, each identified by a separate icon on the Configuration tab of the Home screen.

**Operations**

Enter information about the call center: days of operation, hours of operation, number of seats, settings for 24-hour operation (if needed).

**Shifts**

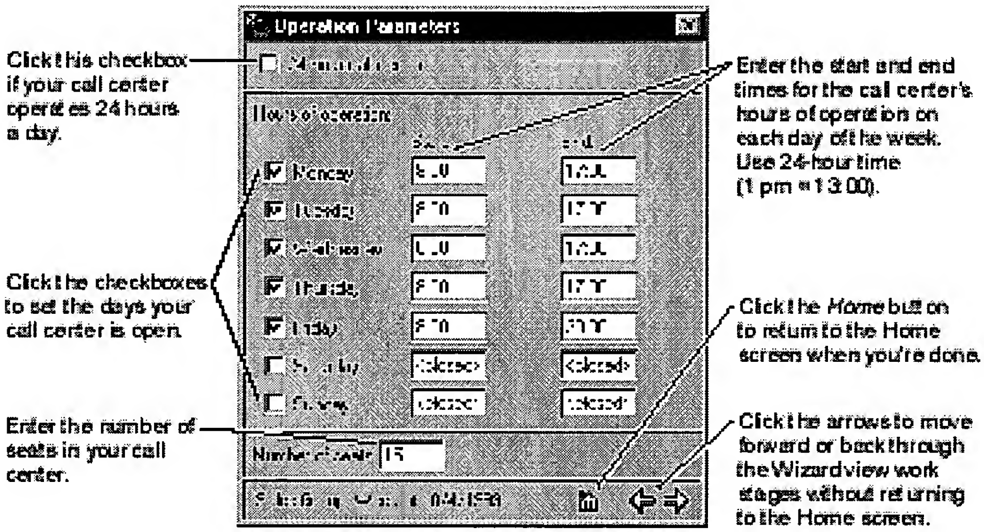
Define shift patterns for the call center: length of shift, starting times for shift, number of breaks, starting times for breaks, length of breaks.

**Employees**

Enter work-related information for each employee: type of employee, minimum and maximum hours to work per week, shift patterns employee can work, days and hours employee is available.

## ENTER OPERATIONS INFORMATION

To enter operational information for your call center—days of operation, hours of operation, number of seats—click the Operations icon on the Configuration tab. The Operation Parameters window appears.




### Setting the number of seats

To set the number of seats or workstations available for agents in your call center, click the *Number of seats* box in the Operation Parameters window, and then enter the proper number. Note that the number of seats represents the maximum number of agents who can work (i.e., answer calls) in your call center at the same time. No matter how many employees you have available, PrimeTime will never schedule more than this number of people to work at a given time.

### Setting days and hours of operation

The days of the week are listed on the left side of the Operation Parameters window. To indicate whether your call center is open or closed on a particular day, click in the box next to the day's name. Checked boxes indicate days the call center is open.

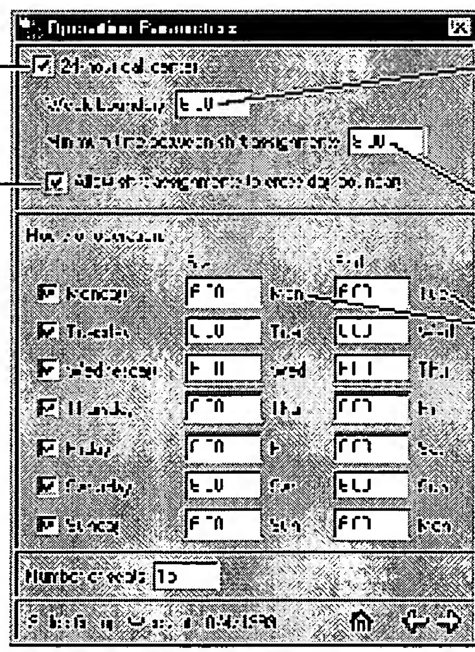
The start and end times for each day are listed next to the day's name. To set the start or end time for a day, click in the corresponding *Start* or *End* box, and enter the proper time. Enter all times in 24-hour form (1 pm = 13:00 hours).

**Tip** *When you click a day's checkbox to activate that day, PrimeTime will automatically copy the start and end times from the previous day so that you don't have to enter times if they're the same from day to day.*

If your call center operates 24 hours a day, click the *24-hour call center* checkbox at the top of the Operation Parameters window. The window will expand to reveal further options for 24-hour operation. See the following section "Setting 24-hour operation" for information on how to set these new options and for other information about 24-hour operation.

### Setting 24-hour operation

To configure your call center for 24-hour operation, click the *24-hour call center* checkbox at the top of the Operation Parameters window. The window will expand to reveal three new options: *Week boundary*, *Minimum time between shift assignments*, and *Allow shift assignments to cross day boundary*.




In the *Week boundary* box, enter the time of day on Monday that you want your new work week to start. Use 24-hour time (i.e., 1 pm = 13:00).

By default, this time is set to 0:00 (midnight), so that the week begins at 0:00 Monday morning and ends at 24:00 Sunday evening. In some circumstances, however, it may make sense to set the week boundary to a different time. If your morning shift starts at 6:00, for example, you might want to set the week

boundary to 6:00. In that case, the hours from 0:00 to 6:00 on Monday morning are counted as part of Sunday night, at the end of the week just completed.

In the *Minimum time between shift assignments* box, enter the minimum amount of time that must elapse between the end of an employee's shift and the beginning of his or her next shift. Enter this time in the form *hours:minutes* (8 hours = 8:00).

**Note** *If the* 24-hour call center *option is not selected, the minimum time between shift assignments defaults to 8 hours (8:00).*

Click the checkbox for *Allow shift assignments to cross day boundary* if you want PrimeTime to be able to assign employees to shifts that cross the boundary between two days (from 22:00 Monday to 6:00 Tuesday, for example). If you do not select *Allow shift assignments to cross day boundary*, then PrimeTime will not schedule anyone to work across the day boundary.

**Note** *The day boundary is set by the week boundary. If your week boundary is 6:00 am, then so is your day boundary. Each 24-hour work day in the week will begin at 6:00 am and end at 6:00 am the following day.*

## CREATE SHIFT PATTERNS

To specify information about work shifts in PrimeTime, you create shift patterns. A shift pattern specifies:

- Type of employee the shift pattern applies to (full-time, part-time, etc.).
- Days of the week the shift pattern applies to.
- Length of the shift (i.e., the number of hours at work, paid and unpaid, including breaks).
- Allowed starting times for the shift.
- Number of breaks during the shift.
- Type of each break.
- Length of each break.
- Allowed starting times for each break.
- Whether the break is paid or unpaid.

## The concept of a shift pattern

A shift pattern is not a schedule or a specific shift assignment. A shift pattern is a general model or template for how time may be assigned during the work day. A schedule, by contrast, turns the general shift pattern into a specific day's assignment for specific employees.

A shift pattern, for example, says that full-time employees work an 8-hour shift, start a 15-minute paid break two to three hours after the start of the shift, start a 30-minute paid lunch break four to five hours after the start of the shift, and start another 15-minute break six to seven hours after the start of the shift.

A schedule created from this shift pattern, on the other hand, says that on Tuesday, April 8, full-time employee Donald Harris starts work at 8:30 am, starts a 15-minute paid break at 10:30 am, starts a 30-minute paid lunch break at 1:00 pm, and starts another 15-minute paid break at 2:30 pm. The schedule also says that on the same day, full-time employee Geoff Weaver starts work at 8:00 am, starts a 15-minute paid break at 11:00 am, starts a 30-minute paid lunch break at 12:30 pm, and starts another 15-minute paid break at 2:00 pm. (Two employees may have the same shift pattern, but on a specific day, they may be scheduled to start work at different times, take their breaks at different times, and go home at different times.)

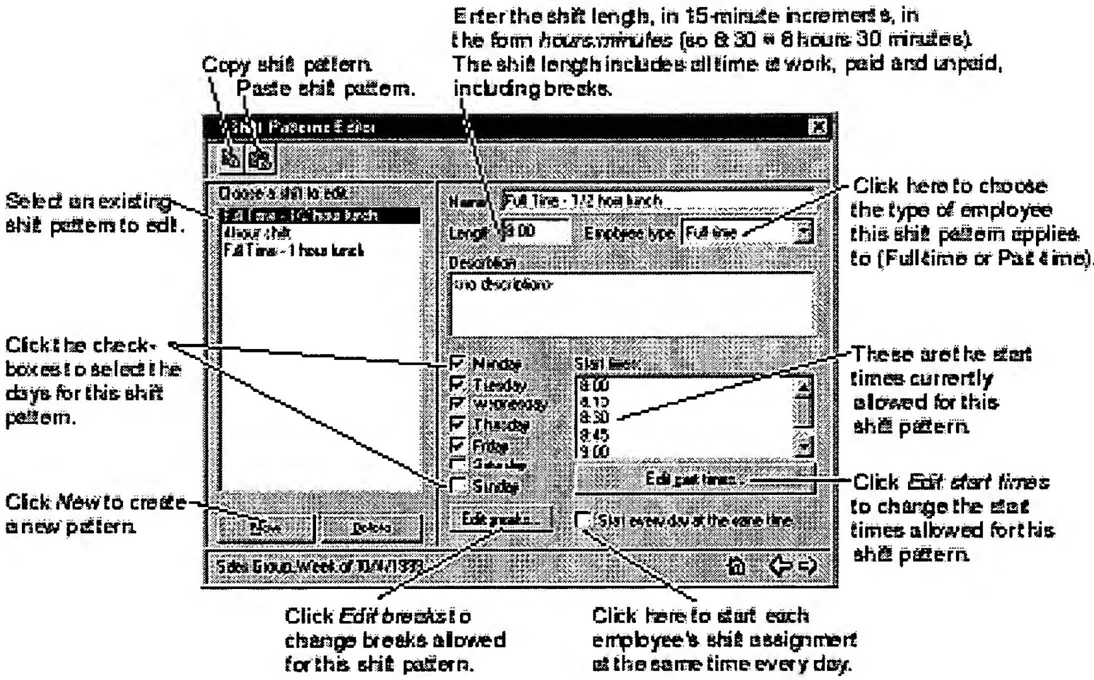
It's the general nature of the shift pattern that gives PrimeTime the flexibility it needs to create efficient schedules week after week. The more flexible the pattern, the more efficient the schedules, so try to make your shift patterns as general as possible. If a particular employee, for example, can only work specific hours, don't try to modify your shift pattern to suit. Instead, edit the employee's information, as described in "Enter employee information" later in this chapter, to make him or her available only at those hours, and then let PrimeTime do the rest.

**Tip**

> *When creating your first shift patterns, remember that you're creating a general model, not a specific shift assignment. So rather than converting your existing shifts directly into corresponding shift patterns, look for a more general pattern. For example, if you currently have weekday shifts starting at 7 am, 8 am, and 9 am, don't automatically create three shift patterns to match. Instead, try a single weekday shift pattern that allows start times of 7 am, 8 am, and 9 am.*

## Creating or editing shift patterns

To create or edit shift patterns, click the Shifts icon on the Home screen to open the Shift Patterns Editor window.




The *Choose a shift to edit* box in the Shift Patterns Editor window displays all currently-defined shift patterns. Click on a shift pattern in the list to display its settings, or click *New* to create a new pattern. To delete a pattern, click on its name to select it, and then click *Delete.*

**Tip**

*To copy and paste shift patterns between groups (or within the same group, to create a duplicate), click on the shift pattern name to select it, and then use the* Copy *and* Paste *buttons at the top of the Shift Patterns Editor window or the keyboard shortcuts Ctrl+C and Ctrl+V. You can also hold down the Ctrl key and click to select multiple patterns to copy and paste.*

To enter or edit the shift pattern information:

1 To enter or edit the shift pattern name, click in the *Name* box, and type in the new name.

**Tip**

> *Give shift patterns clearly descriptive names, such as "Full Time - 1 Hour Lunch." Later on, you'll be selecting shift patterns by name, so choose names that will remind you of how the shift pattern is set up and when it's to be used.*

2. To enter the shift length, click in the *Length* box, and enter the length in the form *hours:minutes* (8:30 = 8 hours 30 minutes, for example). Note that the length includes all time at work, paid and unpaid, including breaks.

**Tip**

> *In any box where you need to enter a duration (a length of time), you can enter simple whole numbers or decimals. If you enter 8, PrimeTime will interpret it as 8:00. If you enter 8.5 or 830, PrimeTime will interpret it as 8:30.*

3. To specify the type of employee this shift pattern applies to, click on the arrow by the *Employee type* box to display the list of available types, and select a type from the list.

4. To specify the days of the week that this shift pattern applies to, click to check or uncheck the boxes next to each day of the week. (Checked boxes indicate selected days.)

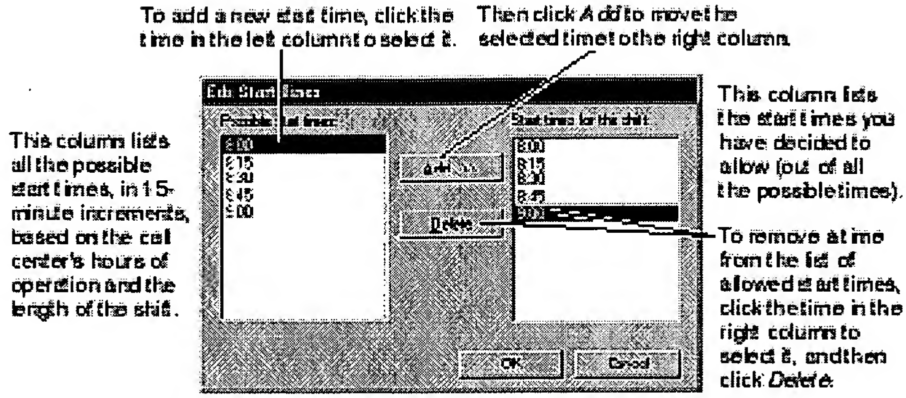
5. The *Start times* box lists the start times currently allowed for this shift pattern. To change the start times, click *Edit start times*, and see the section "Editing start times" below.

   Click the checkbox labeled *Start every day at the same time* to have PrimeTime arrange the schedule so that each employee starts work at the same time every day. PrimeTime will still schedule different employees for different start times in order to give you an efficient schedule, but it will make sure that each individual employee starts at the same time every day.

6. To add or change the breaks for this pattern, click *Edit breaks*, and see the section "Editing breaks" later in this chapter.

## Editing start times

To edit the start times allowed for this shift pattern, click *Edit start times* in the Shift Patterns Editor window. The Edit Start Times window appears.




The *Possible start times* box at the left of the window shows all the possible start times, in 15-minute increments, given the shift length and the call center hours. The *Start times for this shift* box at the right of the screen shows those start times that you wish to allow. When creating a schedule for your employees, PrimeTime uses only those times listed in the *Start times for this shift* box.

**Tip** *When you enter start times and break times for a shift pattern, give PrimeTime as much leeway as you can, by setting many possible start times and setting large windows for breaks. The more flexibility PrimeTime has in scheduling, the better job it can do creating a schedule that matches the employees available to the staffing required. If you need to make changes to accommodate the needs of a specific week, you can make those changes to the actual schedule (as described in Chapter 7) rather than to the shift pattern.*

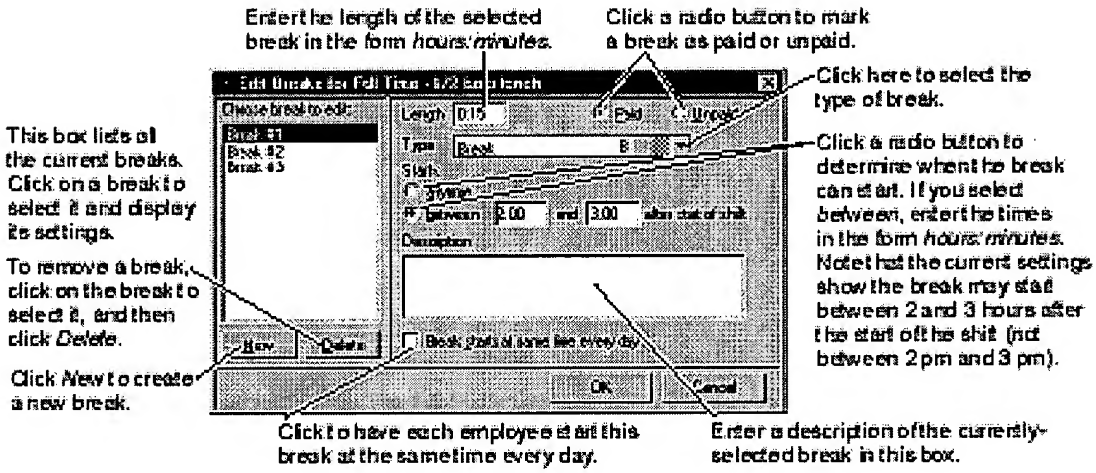
To add a new start time to the list of allowed times, click on the time in the *Possible start times* box to select it, and then click *Add.* To remove a start time from the list of allowed times, click on the time in the *Start times for this shift* box to select it, and then click *Delete.*

**Tip** *You can select more than one time at once in either box. Hold down the Ctrl key and click to select multiple times. Hold down the Shift key and click (or click and drag) to select a contiguous range of times.*

### Editing breaks

To edit the breaks allowed for this shift pattern, click *Edit breaks* in the Shift Patterns Editor window. The Edit Breaks window appears.

**Note** *In PrimeTime, "breaks" include all non-phone activities. Lunch breaks, meetings, and training sessions, for example, all fall into the category of breaks.*




The *Choose break to edit* box at the left of the Edit Breaks window displays all currently-defined breaks for this shift pattern. Click on a break in the list to display its settings, or click *New* to create a new break. To delete a break, click on its name to select it, and then click *Delete.*

**Tip** *When you create new breaks, they will automatically be named Break #1, Break #2, Break #3, etc., as you create them. When you create breaks for a new shift pattern, it's easiest to create them in chronological order, earliest break first. That way, the first break of the day is Break #1, the second break of the day is Break #2, and so forth.*

To set the length of the break, click in the *Length* box, and enter the length of the break in the form *hours:minutes* (so 15 minutes = 0:15).

To set the type of break, click on the arrow by the *Type* box to display the list of available types, and select a type from the list. Each type has a letter code and color code associated with it—these are used to indicate this type of break when displaying or printing a schedule. You can change the break type names, letter codes, and color codes through the View Settings item on the Home screen's View menu. See "Customizing break types" in the "View settings" section of Chapter 4 for more information.

Click the *Paid* or *Unpaid* radio buttons to indicate whether the break time is paid or not. Note that it's important to identify the break correctly as paid or unpaid. If a break is identified as paid, its time is counted against the minimum and maximum hours an employee is allowed to work. If a break is identified as unpaid, it does not count against the minimum or maximum hours for the employee. See "Enter employee information" later in this chapter for information on entering the minimum and maximum hours.

To set the start time of the break, click one of the *Starts* radio buttons. Click *anytime*, if the break can start at any time during the shift, or click *between*, if you want to limit when the break can start. If you select *between*, you must fill in the accompanying time boxes to indicate how long after the start of the shift this break can start. Enter the times in the form *hours:minutes*.

**Note** *If you select* between, *you must enter a number of hours, not a time of day. If you enter* "between *2:00* and *3:00," it means the break can start between 2 and 3 hours after the start of the shift, not between 2 o'clock and 3 o'clock.*

Click the checkbox labeled *Break starts at the same time every day* to have PrimeTime arrange the schedule so that each employee starts this particular break at the same time every day. PrimeTime will still schedule different employees for different break start times, but it will make sure that each individual employee starts this break at the same time every day.

Click in the *Description* box to enter a description of this break.

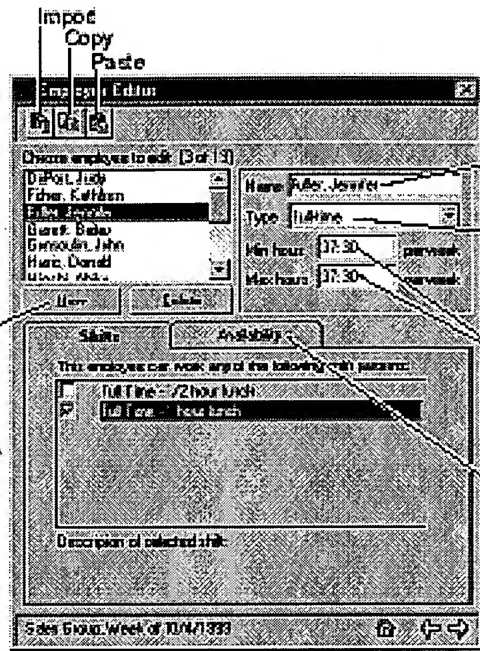
## ENTER EMPLOYEE INFORMATION

To enter the information for your employees—type of employee, minimum and maximum paid hours to work, shift patterns to work, and availability—click the Employees icon on the Home screen. The Employee Editor window appears.

The *Choose employee to edit* box in the Employee Editor window lists the current employees. Click on a name in the list to display that employee's information, or click *New* to add a new employee. To delete an employee, click on the name to select it, and then click *Delete.*

**Tip**

*To copy and paste employees between groups, click on the employee name to select it, and then use the* Copy *and* Paste *buttons at the top of the Employee Editor window or the keyboard shortcuts Ctrl+C and Ctrl+V. You can also hold down the Ctrl key and click to select multiple employees to copy and paste. When you copy an employee to a new group, the employee's shift patterns are copied at the same time.*




To enter information for the selected employee:

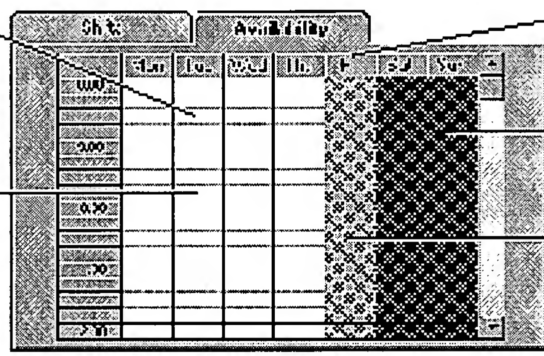
1. Click in the *Name* box to enter or edit the employee name.
2. Click the arrow by the *Type* box to display the list of available employee types, and then select a type from the list (Full-time, Part-time, etc.).
3. Click in the *Min hours* and *Max hours* boxes to enter the minimum and maximum number of paid hours per week this employee can work. Enter the hours in the form *hours:minutes* (45 hours = 45:00).

**Note** *The* Min hours *and* Max hours *values here are for paid hours only. If you have identified a break as paid, its time is counted against the minimum and maximum hours that an employee may work. If you identify a break as unpaid, its time is not counted against the minimum and maximum hours. So if you specify that an employee can work a maximum of 45 paid hours per week, and if that employee works a shift pattern that has 5 paid break hours per week, then PrimeTime will schedule that employee for 40 hours per week actually answering calls in the call center plus 5 hours per week paid break time. See "Editing breaks" earlier in this chapter for information on setting break times.*

4. Click the Shifts tab in the window to display the shift patterns that have been defined for this employee type. Click the boxes next to each pattern to indicate which patterns this employee can work. (A check indicates that the pattern is selected.)

5 Click the Availability tab to display the employee's weekly availability. The light blocks indicate the employee is available to work, and the dark blocks indicate that the employee is unavailable.

To change the employee's availability, just click and drag on the chart with your mouse. The click and drag acts as a toggle, reversing the current setting. If you click and drag starting in a light (available) block, all the blocks you drag through will be changed to dark (unavailable). If you click and drag starting in a dark (unavailable) block, all the blocks you drag through will be changed to light (available).




**Tip**

| |
|---|
| *You can use the Availability tab to make an employee unavailable at specific times throughout the week. For example, click and drag from 8 am Monday to 10 am Friday to block out the 8 am to 10 am period for all five days.* |

### Importing employee information

While in the Employee Editor, you can import employee information from a text file using the *Import* button. See "Importing employee information" in the "Import and export data" section of Chapter 9 for details.

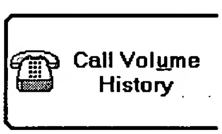
Chapter 6

# Working with Histories & Forecasts

This chapter explains how to work with the call volume histories and forecasts that provide the basis for PrimeTime's scheduling. It includes sections on:

- **Call volume histories**: Reviewing and editing historical call volume data.
- **Call volume profiles**: Creating and viewing composite call volume profiles to be used in forecasting.
- **Call volume forecasts**: Creating and editing forecasts of future call volumes, based on call volume profiles.
- **Service goals and parameters**: Setting service goals and parameters for your call center.
- **Agent requirements**: Projecting agent requirements based on call volume forecasts and service goals.

## WORK WITH CALL VOLUME HISTORIES AND PROFILES




To enter the Call Volume History module of PrimeTime, click the Call Volume History tab in PrimeTime's Wizard view Home screen.

In the Call Volume History module, you can view and edit historical call volume info for past weeks and create composite profiles of call volumes to use in forecasting for future weeks.

The Call Volume History section is divided into two tasks, each identified by a separate icon on the Call Volume History tab of the Home screen.

**History**

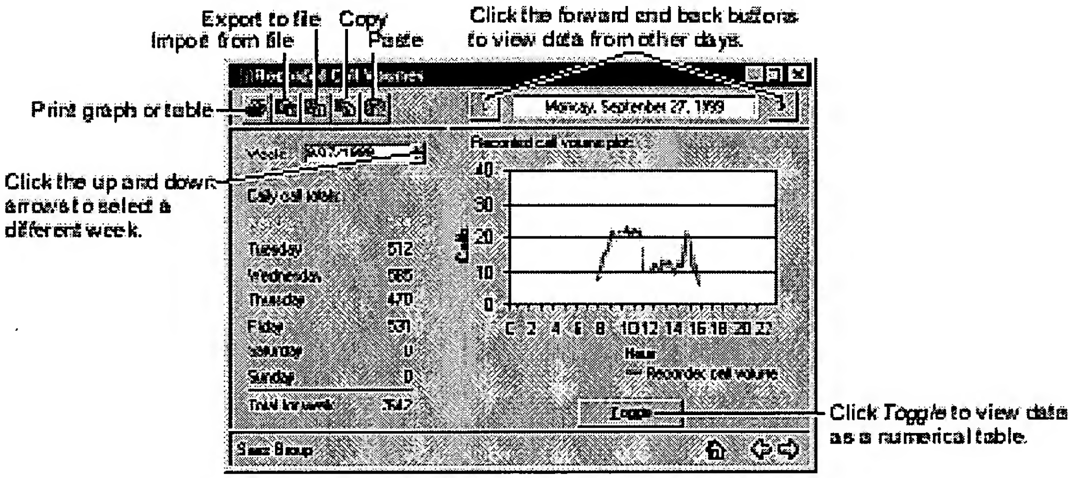
View and edit information from call volume records of past weeks.

**Profiles**

Create composite profiles of call volumes, using historical call volume records.

## Viewing and editing call volume histories

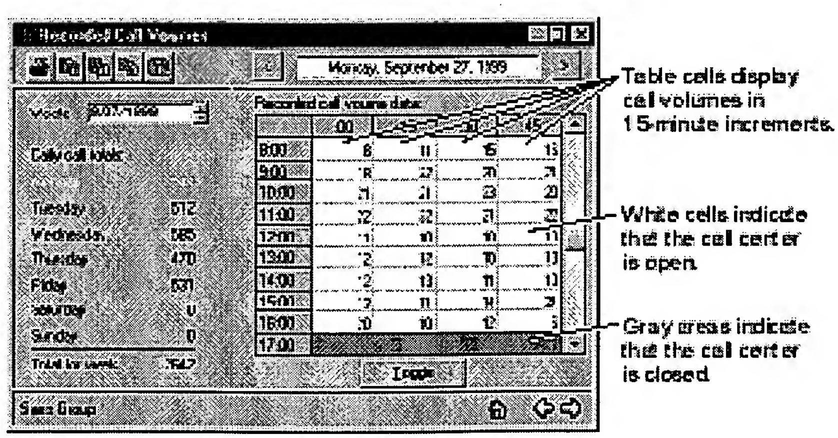
To view or edit call volume histories, click the History icon on the Home screen's Call Volume History tab. The Recorded Call Volumes window appears.




The currently-selected day is shown at the top of the window. To display the call volume for a different day in the current week, click the forward or back button to change the day. (You can also click directly on the name of the day in the *Daily call totals* list at the left of the window.)

The currently-selected week is shown in the *Week* box. Click the up or down arrows by the *Week* box to select a different week. (Weeks that contain call volume data are black; weeks with no data entered yet are gray.)

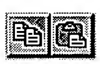
To view the call volume as a numerical table instead of a graph, click the *Toggle* button below the graph. (To return to the graph display, click *Toggle* again.)



### *To edit call volume data*

To enter or edit call volume data directly, select the week and day you want in the Recorded Call Volumes window, and then click *Toggle* to switch to the numerical table display of call volumes. In the numerical table view, the call volumes are displayed in 15-minute increments for all the open hours of the call center. To enter or change a particular number, just click in the appropriate cell of the table, and enter the new number.

**Note** *PrimeTime requires that data be entered in 15-minute intervals, as shown in the table display of the Recorded Call Volumes window above. If the data you want to enter is reported in 30-minute or 60-minute intervals, you must divide it into 15-minute intervals when you enter it into PrimeTime. For example, if your data is in 60-minute intervals, and it shows 80 calls for the 60 minutes beginning at 7:00, don't just enter 80 under 7:00 and leave 7:15, 7:30, and 7:45 blank. Instead, divide the calls among the four 15-minute intervals (entering 20 calls each for 7:00, 7:15, 7:30, and 7:45).*



Using the *Copy* and *Paste* buttons at the top of the window (or the keyboard shortcuts Ctrl+C and Ctrl+V), you can copy call volume data between days, between weeks, and between groups. (When you click the *Copy* button, a dialog box gives you the option of copying the current day or the current week.)

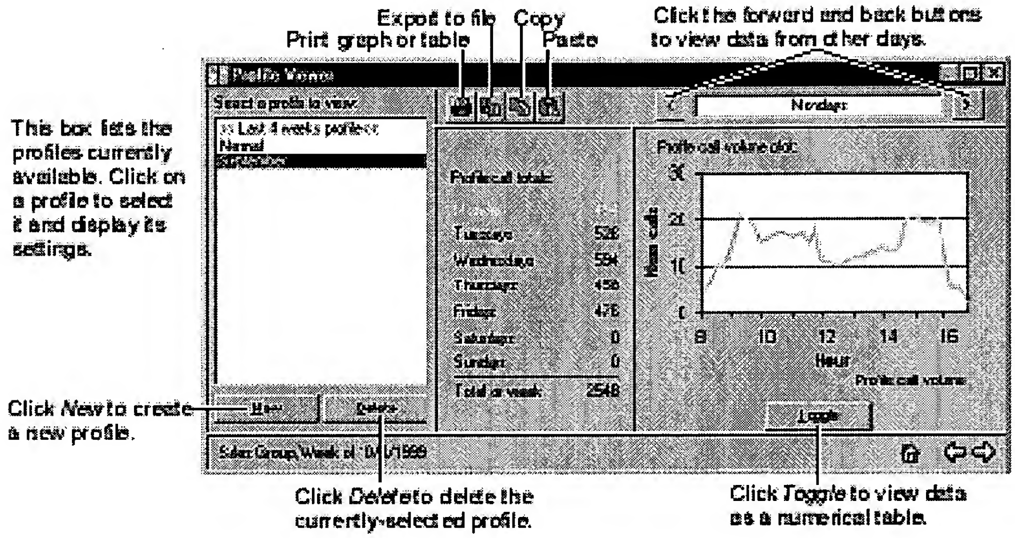
Using the *Import* and *Export* buttons, you can import and export large amounts of data to and from a variety of file formats. For information on importing and exporting call volume data, see "Import and export data" in Chapter 9.

## Viewing and creating call volume profiles

PrimeTime uses your historical call volume data to help create forecasts of future call volumes. But any single week of historical data probably contains at least some quirks and irregularities, major or minor—a sudden drop in calls for the hour after lunch on one day, for example, or an unexpected rise in calls on Friday afternoon. So rather than using the data from a specific week directly, PrimeTime allows you to combine any number of weeks and average their data to create a more general profile of call volume.

By averaging the data from several weeks, this call volume profile smoothes out the one-time quirks of any particular week, creating a more accurate predictor of future call volumes. In addition, you can build a variety of profiles to suit different situations (one profile for normal weeks, for example, and another profile for weeks immediately following a catalog mailing).

To view or create a call volume profile for your call center, click the Profiles icon on the Home screen's Call Volume History tab. The Profile Viewer window appears.

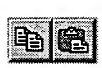



The *Select a profile to view* box at the left side of the window displays all the currently-defined profiles. Click on the name of a profile to select it and display its data, or click *New* to create a new profile. To delete a profile, click on its name to select it, and then click *Delete.*

**Tip**

> *The* >>Last 4 weeks profile<< *is an automatic PrimeTime profile that averages the call volume data from the previous four calendar weeks. (If only three of the previous four weeks contain data, for example, those three weeks are added together and the results divided by three rather than four.) See "To change the automatic profile" later in this chapter for information on changing the number of weeks used.*

To view the selected profile for different days of the week, click the forward or back buttons at the top of the screen, or click on the name of the day in the *Profile call totals* list. To view the call volume data as a numerical table, click *Toggle.*



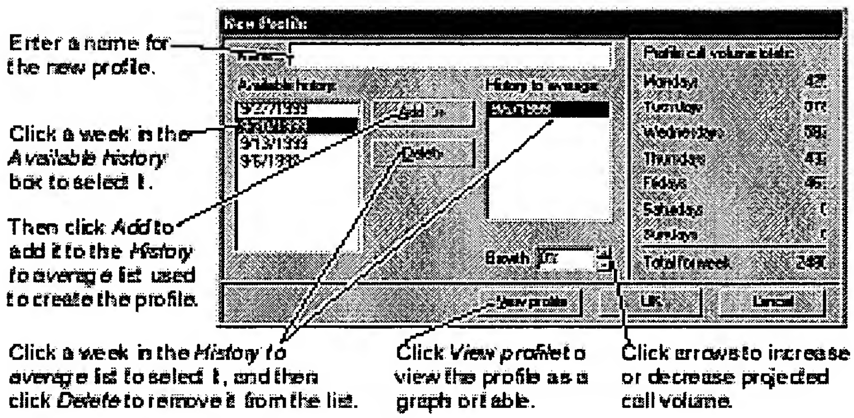
Using the *Copy* and *Paste* buttons at the top of the Profile Viewer window (or the keyboard shortcuts Ctrl+C and Ctrl+V), you can copy profile data between days, between weeks, and between groups. (When you click the *Copy* button, a dialog box gives you the option of copying the current day or the current week.)

Using the *Export* button, you can export profiles to a variety of file formats. For information on exporting profiles, see the "Import and export data" section in Chapter 9.

### *To create a new profile*

To create a new call volume profile:

**1** In the Profile Viewer window, click *New*. The New Profile window appears.




**2** Click in the *Name* box, and then enter a name for the new profile. Make the name descriptive so that you'll remember the characteristics of this profile ("Catalog drop on Monday" for example).

**3** The *Available history* box displays the weeks of historical call volume data that you have available to work with.

Click on a week to select it, and then click *Add* to add it to the *History to average* box. Add as many weeks as you wish for the profile.

To remove a week from the profile, click on the week in the *History to average* box to select it, and then click *Delete*. (The week will be removed from the *History to average* but will still appear in the *Available history* box should you wish to use it again.)

**4** If you wish, you can increase or decrease the call volume of the profile. Just click the up or down arrows of the *Growth* box to change the percentage of growth. (Positive percentages represent an increase, negative percentages a decrease.) PrimeTime increases or decreases the call volume proportionally so that the profile curve remains the same.

**5** Click *View profile* to see the call volume profile created from these weeks. The View Profile window appears.

6 In the View Profile window, click *Toggle* to switch back and forth between graph and table views of the profile. Click the forward and back buttons to view the profile for different days of the week.

**Tip**

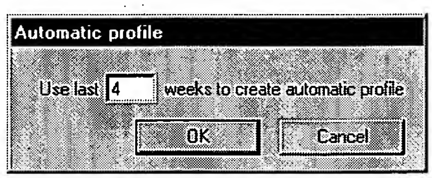
*How many weeks should you include when creating a new profile? Four weeks will make a good start, though you can begin with just one if that's all you have. Once you've collected many weeks of data, don't automatically lump 52 weeks into a single profile. Instead, try to build a library of profiles that mirror the behavior of your callers at different times of the year or in different situations. In a sales center, for example, you may be able to create one profile for the summer months and another for the Christmas season.*

### *To change the automatic profile*

As mentioned previously in this chapter, PrimeTime's Profile Viewer includes a profile named >>*Last 4 weeks profile*<< in its list of available profiles. This profile automatically averages the data from the last four weeks to create a call volume profile. If not all of the last four weeks have data, the profile averages only those weeks that do have data.

To change the number of weeks used to create this automatic profile:

1 In the Profile Viewer window, double-click the >>*Last 4 weeks profile*<< item in the *Select a profile to view* list. The Automatic Profile window will appear.




2 Enter the number of weeks you want to use for the automatic profile.

3 Click *OK* to close the Automatic Profile window.

The name of the profile will change to reflect the number of weeks you entered.

## CREATE FORECASTS

To enter the Forecast module of PrimeTime, click the Forecast tab in PrimeTime's Wizard view Home screen.

In the Forecast module, you create forecasts of call volumes for the current week, specify service goals, and then project the number of agents required, given the call volume forecast and service goals.

The Forecast section is divided into three tasks, each identified by a separate icon on the Forecast tab of the Home screen.

**Forecast**

View or modify the current forecast, or create a new forecast.

**Service Parameters**

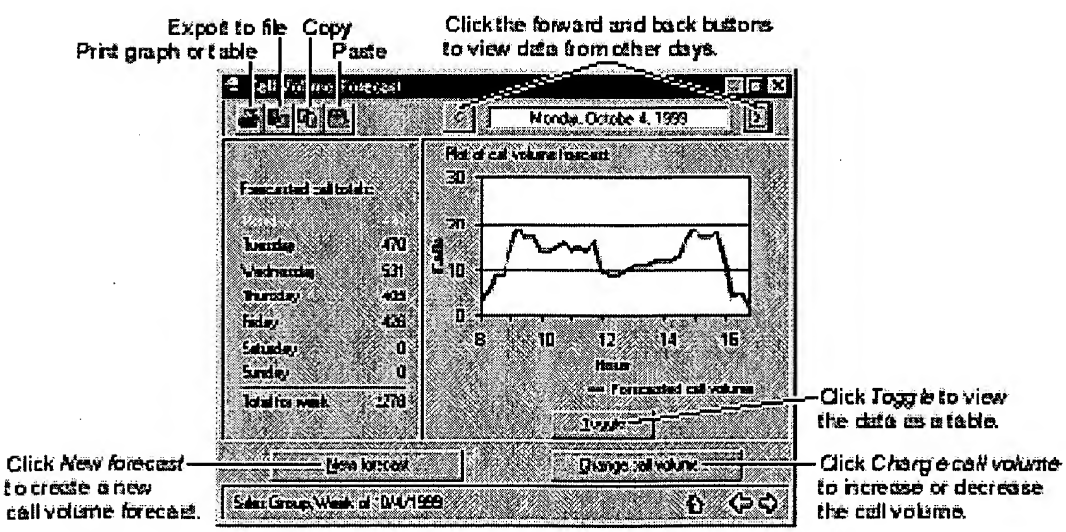
Enter service goals for your call center (such as time to answer) and work-related information (such as expected rate of absenteeism).

**Agent Requirements**

Display the agent requirements, as projected by your call forecasts and service goals.

### Creating and viewing forecasts

To view the call volume forecast for the current week—and to modify it or create a new one if you wish—click the Forecast icon on the Home screen's Forecast tab. The Call Volume Forecast window appears.



The Call Volume Forecast window displays the current forecast, if there is one. (If there is no forecast, click *New forecast* to create one.)

To view the forecast as a table instead of a graph, click *Toggle.* In the table view, the forecast call volumes are displayed in 15-minute increments for all the open hours of the call center. If you want to change a particular number, click in the appropriate cell of the table, and enter the new number. (If you want to scale the whole forecast up or down, see the following two sections: "To create a new forecast" and "To change a forecast's call volume.")

To view the forecast for other days of the week, click the forward and back buttons, or click the name of the day in the *Forecasted call totals* list.

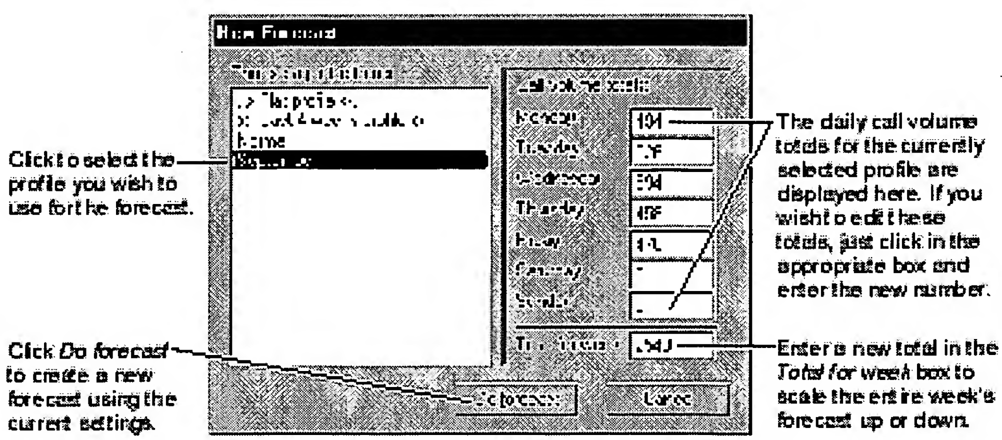
Using the *Copy* and *Paste* buttons at the top of the Call Volume Forecast window (or the keyboard shortcuts Ctrl+C and Ctrl+V), you can copy forecasts between days, between weeks, and between groups. (When you click the *Copy* button, a dialog box gives you the option of copying the current day or the current week.) If you wish, you can also copy data directly from the Recorded Call Volumes window into the Call Volume Forecast window, without first creating a profile, though you do lose the smoothing effect of the profiles.

Using the *Export* button, you can export forecasts to a variety of file formats. For details, see "Import and export data" in Chapter 9.

### *To create a new forecast*

To create a new forecast:

**1** In the Call Volume Forecast window, click *New forecast.* The New Forecast window opens.



2 The *Choose a profile to use* box on the left lists all the available call volume profiles. Click the name of the profile you want to use for the forecast to select it. (The profile named ">>Flat profile<<" simply distributes a weekly call total evenly across the days of the week.) The daily and weekly call volume totals for the selected profile appear in the *Call volume totals* box.

**Tip**

> *When you select a profile in the New Forecast window, the daily and weekly call volume totals for that profile appear in the* Call volume totals *box. If you want to change the totals used for the forecast, click in the box for an individual day or in the* Total for week *box, and enter the new number. If you raise or lower a day's total, the change is scaled proportionally over the whole workday. If you change the week's total, the change is scaled proportionally over the entire week.*
>
> *If you want to reset the call volume totals to their original values, click the profile name again.*

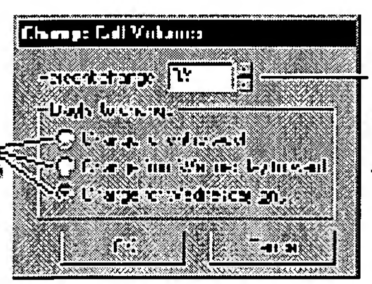
3 Click *Do forecast* to create the forecast using the selected profile. The Call Volume Forecast window now displays the new forecast.

### *To change a forecast's call volume*

If you decide, even in mid-week, that the call volume of the forecast needs to be revised—based on past experience, on new data, or on recorded call volumes from the first days of the week—you can increase or decrease the call volume while maintaining the same profile.

To change the call volume for the current forecast:

1 In the Call Volume Forecast window, click *Change call volume*. The Change Call Volumes window opens.

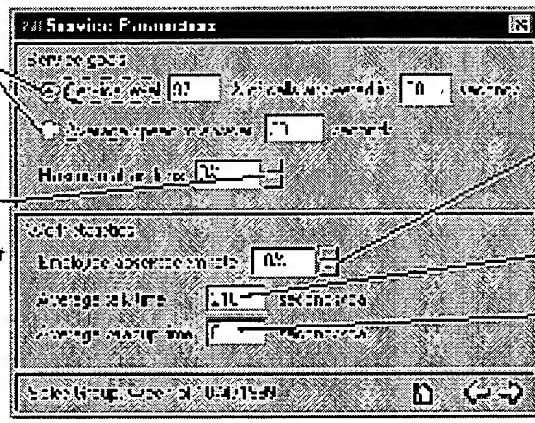



2 Click the up or down arrows at the top of the window to set the percent change you want. (Negative percentages indicate a decrease in volume.)

**3** Click one of the three radio buttons to apply this change to the entire week, to the rest of the week only (from the current day on), or to the current day.

## Setting service goals and parameters

To set the service parameters for the current week—including time to answer, average talk time, and expected absenteeism—click the Service Parameters icon on the Home screen's Forecast tab. The Service Parameters window appears.




In the *Service goals* section, click a radio button to specify your goals as *Service level* (% of calls answered) or as *Average speed to answer*. If you select *Service level*, click in the *seconds* box to enter the time limit and in the *%* box to enter the percentage of calls to be answered within that time. If you select *Average speed to answer*, click in the *seconds* box to enter the average elapsed time to answer that you want to allow.

**Tip**

*You may find* Service level *a better gauge of performance than* Average speed to answer. *A good average speed may hide the fact that some calls are being answered very quickly but others very slowly.*

*Also, note that under the Erlang model used by PrimeTime, the maximum service level is 99%, not 100%. PrimeTime won't accept an entry of 100% in the* Service level *box.*

In the *Maximum abandons* box, click the up and down arrows to specify the percentage of abandoned calls you expect. (Abandoned calls are those in which the caller hangs up before an agent answers.) Base this setting on the percentage that your historical call data has shown you can actually expect. Don't set it to zero, for example, even though fewer abandons may be your goal.

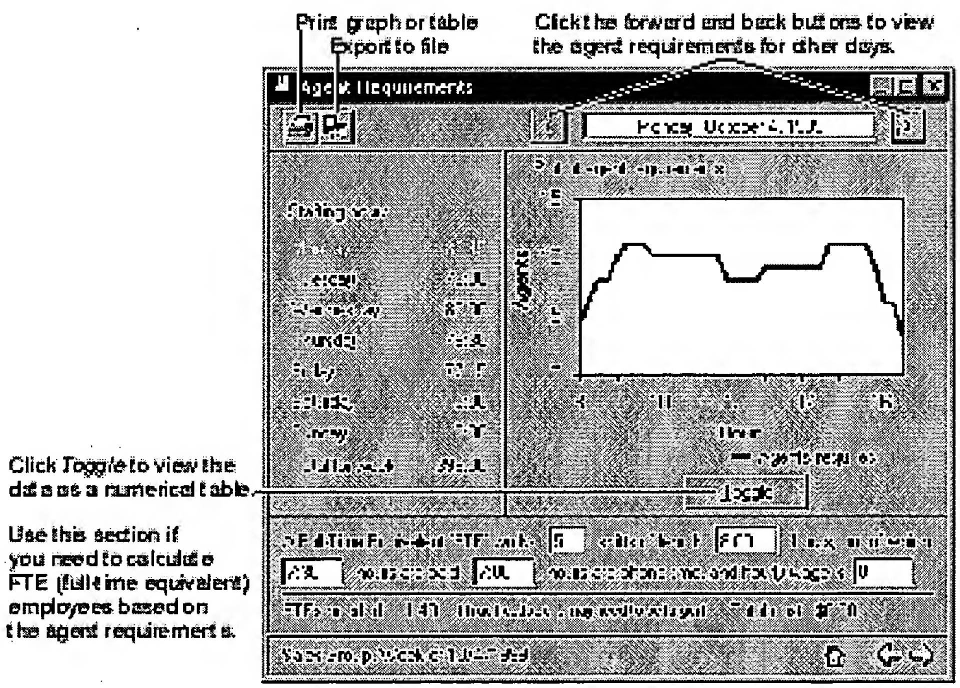
In the *Work statistics* section, click the up and down arrows by the *Employee absenteeism rate* box to set the percent of employee absences you expect (for sickness or other reasons).

Click in the *Average talk time* box to enter the average number of seconds agents spend on a call. Click in the *Average wrapup time* box to enter the average number of seconds agents must spend after the call to complete work related to the call (i.e., before they are ready to answer another call).

## Displaying agent requirements

Based on the call volume forecast and the service parameters, PrimeTime projects your agent requirements—the number of people needed to answer calls in your call center at different times of the day and on different days of the week.

To display the projected agent requirements, click the Agent Requirements icon on the Forecast tab of the Home screen. The Agent Requirements window opens.




The window displays the number of agents required at 15-minute intervals throughout the work day.

To view the agent requirements as a numerical table instead of a graph, click *Toggle*. To view the requirements for different days of the current week, click the forward and back buttons at the top of the window to select other days, or click on a day in the *Staffing hours* box.

### *To calculate FTEs*

The Agent Requirements window also provides a simple calculator for figuring FTEs (full-time equivalents). To calculate the FTEs, based on the agent requirements, you can enter the appropriate numbers in this section: the number of shifts per week, the number of hours per shift, the number of paid hours per shift, the number of phone hours per shift, and (if you wish) the hourly wage.

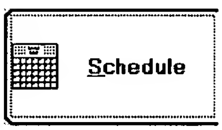
Please note that this calculator is for your convenience only. The numbers you enter here—and the results they provide—are not used elsewhere in PrimeTime and do not affect the schedule or other parts of the program. In addition, the FTE results provided are an estimate—the actual number of employees required to fill your schedule may be higher.

## Chapter 7

# Scheduling with PrimeTime

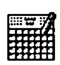
This chapter brings you to the heart of PrimeTime—creating and editing schedules. It includes sections on:

- **Schedules**: Creating, viewing, editing, and printing schedules.
- **Reports**: Viewing and printing a variety of reports on the effectiveness of your schedules.




To enter the Schedule section of PrimeTime, click the Schedule tab in PrimeTime's Wizard view Home screen. In the Schedule section, you create and edit schedules for the week, based on the agent requirements you have generated in PrimeTime. In this section, you can also generate reports to compare actual vs. projected staffing, call volumes, and so forth.

The Schedule section is divided into two tasks, each identified by a separate icon on the Schedule tab of the Home screen.



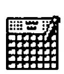
**Schedule**

View, edit, or create employee schedules for the current week.

**Reports**

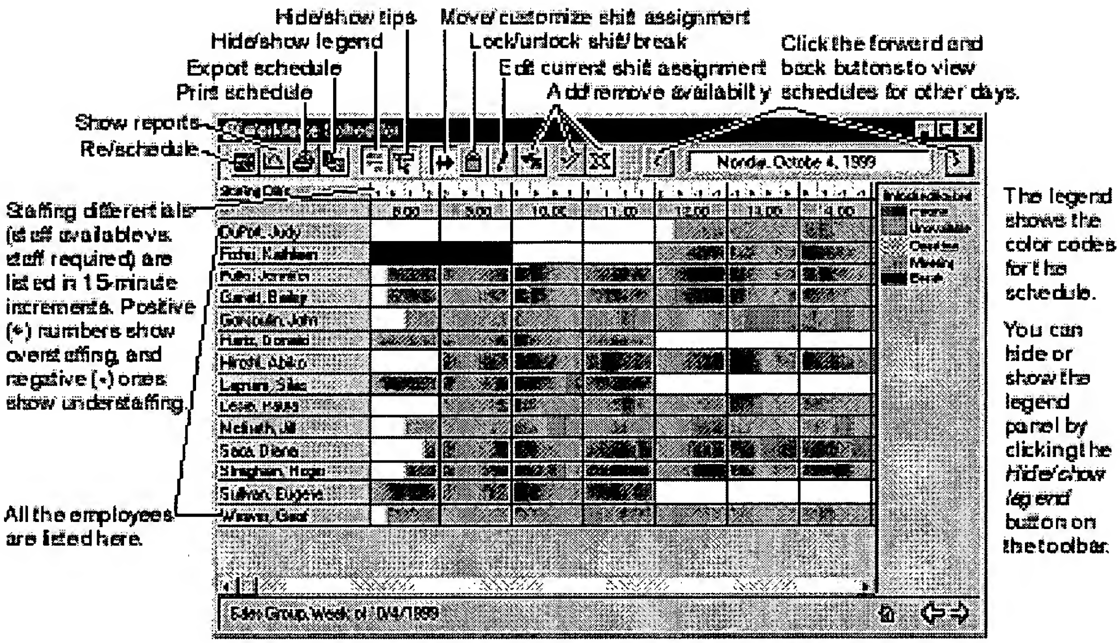
Generate reports of actual vs. projected performance for service level, average speed to answer, call volume, and staffing level.

## WORK WITH SCHEDULES



To create, view, edit, or print a schedule for the current week, click the Schedule icon on the Schedule tab of the Home screen. The Workforce Scheduler window appears.

To view the schedule for different days of the week, click the forward and back buttons at the top of the window. To print the schedule, click the *Print* button on the toolbar at the top of the window.




**Tip**

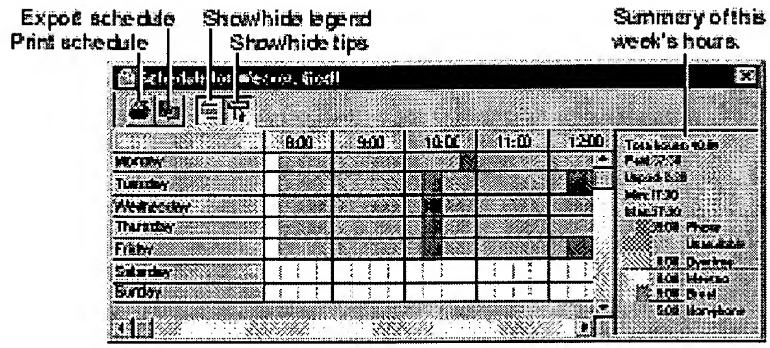
> *Right-click on an employee's shift assignment to pop up a menu of schedule commands. From this menu, you can choose most editing commands available in the Workforce Scheduler window.*

The Workforce Scheduler window displays the open hours of the call center, in 15-minute intervals. If you have already created a schedule, then PrimeTime fills in the schedule for each employee, using different colors and patterns to indicate work times, break times, overtime, and so forth. The legend at the right side of the window explains the meaning of each color and pattern used in the schedule.

At the top of the schedule, just above the line that lists the hours of the day, is a line of positive and negative numbers labeled *Staffing Diffs*. These numbers indicate the difference between the staffing provided by the schedule currently displayed and your projected agent requirements. Negative numbers indicate understaffing and positive numbers overstaffing. (More information on over- and understaffing levels is available in the Reports module. See "View reports" later in this chapter.)

## Viewing an employee's schedule for the week

To view a single employee's schedule for the entire week, double-click on the employee's name (or right-click on the employee's schedule, and choose Agent View from the menu that appears). The Agent View window appears.



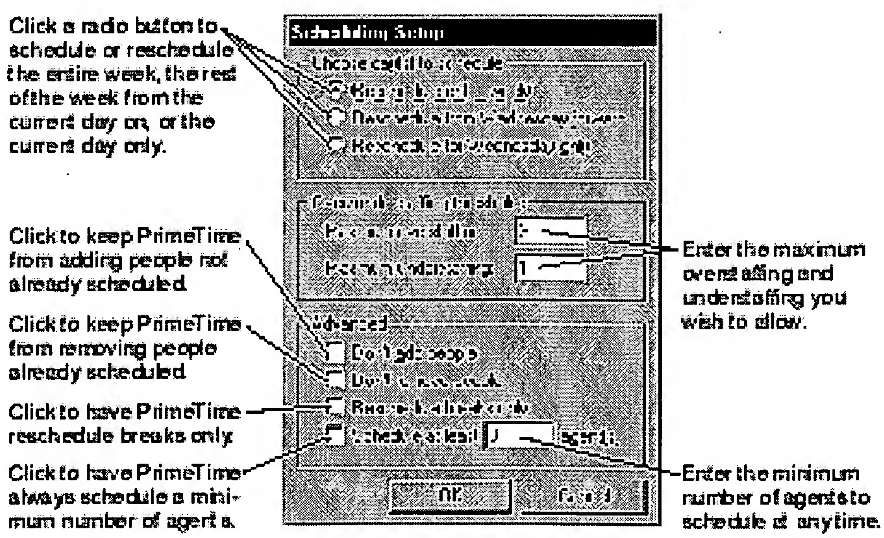

The Agent View window shows the selected employee's schedule for the week, plus a summary of the employee's hours for the week (paid and unpaid, phone and non-phone, etc.).

To print the employee's schedule, click the *Print* button at the top of the Agent View window. (See "Printing a schedule" later in this chapter for information on printing options.)

To export the employee's schedule to a variety of file formats, click the *Export* button. (See "Import and export data" in Chapter 9.)

## Creating a schedule

To create a schedule—or to reschedule an existing one—click the *Re/schedule* button at the left end of the toolbar. The Scheduling Setup window appears.



In the *Choose day(s) to schedule* section of the window, click one of the three radio buttons to schedule or reschedule the entire week, the rest of the week from the current day forward, or only the current day.

In the *Over/understaffing thresholds* section, enter the over- and understaffing level you will allow—that is, the difference between the number of employees actually scheduled to work a particular time slot and the agent requirements projected for that slot. Click in the *Maximum overstaffing* box, and enter the level of overstaffing you are willing to allow. Click in the *Maximum understaffing* box, and enter the level of understaffing you are willing to allow. See the section "To set over/understaffing thresholds" below for a more detailed explanation of this option.

In the *Advanced* section, you can select one or more of the four advanced options, in order to restrict PrimeTime's scheduling. In general, it's best to leave all four of these options unchecked in order to give PrimeTime the most flexibility when creating a schedule to match your employees to your staffing requirements. However, if you need to, you can choose to instruct PrimeTime not to add any people to the schedule, not to remove any people from the schedule, to reschedule only break times (not work times), and to always schedule at least a specified number of people. See the section "To set advanced options" later in this chapter for more information.

Click *OK* to close the window and create a new schedule. Click *Cancel* to close the window without creating a new schedule (leaving any existing schedule unchanged).

### *To set over/understaffing thresholds*

In the *Over/understaffing thresholds* section, you specify how much variation from the projected agent requirements you wish to allow. Click in the *Maximum overstaffing* box, and enter the level of overstaffing you are willing to allow. Click in the *Maximum understaffing* box, and enter the level of understaffing you are willing to allow.

No matter what numbers you enter here, PrimeTime will always try to achieve the exact staffing level required (no overstaffing, no understaffing) whenever possible. However, when it is unable to do so (because of the variation in call volumes during the day), PrimeTime will rely on the over- and understaffing thresholds you set here to create a schedule.

For example, if you set *Maximum understaffing* to 4 and *Maximum overstaffing* to 1, you are telling PrimeTime to create a schedule that is up to four agents

short in any time period before it schedules more than one extra agent in any time period.

If, on the other hand, you set *Maximum understaffing* to 1 and *Maximum overstaffing* to 4, then you are telling PrimeTime to use up to four extra agents in any time period before allowing the schedule to be more than one agent short anywhere.

Since your full-time employees probably work a fixed number of hours per week, these thresholds won't affect their quantity of work. If you have part-time agents available, however, then the thresholds you set will help PrimeTime determine how much use to make of part-time employees and how best to schedule their hours. Note that if you allow greater understaffing than overstaffing, you will save on wages, since fewer part-time agents will be working, but your service level may suffer. On the other hand, if you allow greater overstaffing than understaffing, you will be more likely to meet or exceed your service goals at all times, but you will spend more on wages.

### *To set advanced options*

In the *Advanced* section of the Scheduling Setup window, you have four options you can use to restrict what PrimeTime does when it creates or recreates your schedule. The first three are quite straightforward. If you click the *Don't add people* box, PrimeTime will not add any more people than are already scheduled when it creates a new schedule. If you click the *Don't remove people*, PrimeTime won't remove anyone already scheduled, even if those people aren't necessary for an efficient schedule. If you click the *Reschedule breaks only* box, PrimeTime will adjust only the break times, not the work start and end times, when it creates a new schedule.

If you click the *Schedule at least __ agent(s)* box, you can specify a minimum number of agents to be scheduled at any time. With this option, you are telling PrimeTime never to schedule fewer than this many people during any period. For example, you might use this option if you run a call center that's open 24 hours a day but gets very few calls in the middle of the night. Even if your recent call history shows no calls during the 1 am to 5 am period, you'd want to maintain a minimum staff in the call center during those hours. To specify that minimum number, use the *Schedule at least __ agent(s)* option.

Be aware that breaks are viewed a bit differently in this option. Normally, PrimeTime schedules people so that you always have the required number of people actually on the phones—it doesn't count people while they're on breaks.

For the *Schedule at least __ agent(s)* option, however, PrimeTime does count people who are on breaks. For example, if you set a minimum of two agents for your midnight to 8 am shift, PrimeTime will consider the minimum to be met if there are two agents at work, even though one of them may be on a break. That way, PrimeTime doesn't have to schedule a third person to come in in the middle of the night just to cover when one of the two agents takes a lunch break.

## Scheduling a meeting

At times, you may need to schedule a common meeting or training session for some or all of your call center employees. PrimeTime provides a Meetings Editor to find the meeting times that best fit the schedules of the people you wish to attend the meeting.

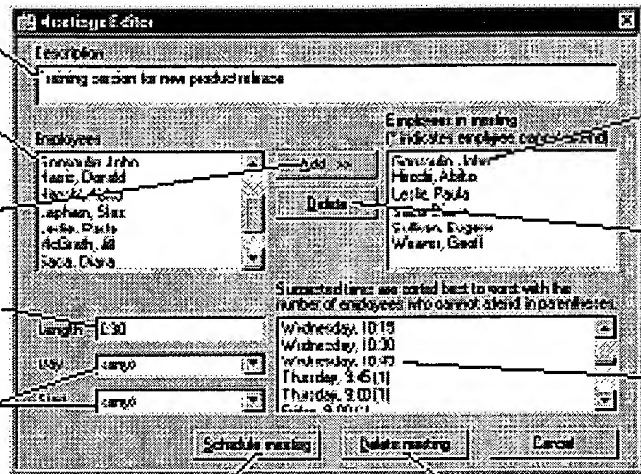
**Tip**

> *The Meetings Editor will propose meeting times that have the least possible impact on the current schedule. However, any meeting will have some impact, and long meetings or meetings that involve many employees may have serious effects on your service level at that time. As a result, it is important to check the schedule carefully after you leave the Meetings Editor to see how your coverage has been affected. If necessary, you can improve coverage by rescheduling people not at the meeting, manually adjusting their breaks or shift assignments, bringing in part-timers, and so forth.*

### *To schedule a new meeting*

To schedule a new meeting, right-click on any part of the schedule in the Workforce Scheduler window, and then choose New Meeting from the menu that appears. The Meetings Editor window will open.

In the *Description* box of the window, enter a brief description of the meeting. This description will appear as part of the tip that pops up in the Workforce Scheduler window when you move the mouse over the meeting time in the schedule (to remind you what the meeting is about).




To add an employee to the meeting, click on the employee's name in the *Employees* box to select it, and then click the *Add* button to copy the name to the *Employees in meeting* box. To remove an employee from the meeting, click on the employee's name in the *Employees in meeting* box, and then click the *Delete* button. You can also click while holding down the Ctrl or Shift key to select multiple names at once.

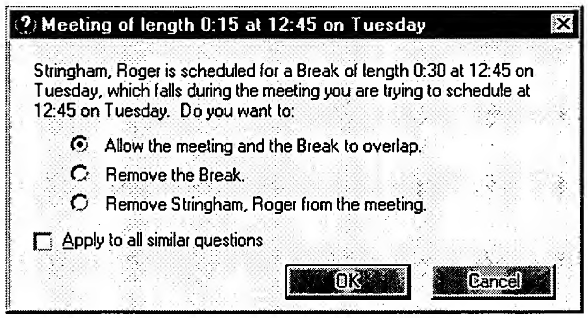
In the *Length* box, enter the length of the meeting, in the form *hours:minutes* (i.e., 1:30 = 1 hour 30 minutes).

If the meeting must be on a specific day or at a specific time, select the day or time from the *Day* or *Start* lists. However, when you do so, you restrict PrimeTime's ability to find a time that is the best fit for the most people, so if possible, leave these items set to <*any*> to give PrimeTime the most flexibility.

The suggested times for your meeting appear in the *Suggested times* box at the bottom of the window, sorted from best to worst. A number in parentheses after a suggested time indicates the number of people who can't attend.

Click on a meeting time in the *Suggested times* box to select it. The day and time of the meeting will appear in the *Day* and *Start* boxes. If an employee can't attend the meeting at that time, an asterisk (*) will appear by the employee's name in the *Employees in meeting* box.

When you are satisfied with the settings, click the *Schedule meeting* button to close the window and place the meeting on the schedule. If there is a conflict between the meeting time and the breaks of any of the employees attending the meeting, a dialog box like the following will appear.




To resolve the conflict, click a radio button to allow the meeting and break to overlap, to remove the break, or to remove the employee from the meeting. If more than one person has a conflict with the meeting, you can check the *Apply to all similar questions* box to have PrimeTime resolve similar conflicts in the same way without asking.

When you return to the Workforce Scheduler window, it will display the part of the schedule that includes the meeting. Note that the shift assignments of the employees attending the meeting are locked so that they will not be rescheduled.

As mentioned earlier, a meeting may have effects on your service level, so check the schedule, including the *Staffing Diffs* section, and the Service Level or ASA reports in the Reports module to see whether the results are acceptable. If not, you can have PrimeTime reschedule the day, which won't affect the meeting members because their shift assignments are locked. You can also manually edit the schedule to improve coverage—see "Editing an existing schedule" later in this chapter. For example, you can adjust the breaks of employees not at the meeting so that they can cover during the meeting time, or you can add part-time employees to augment your workforce for the day.

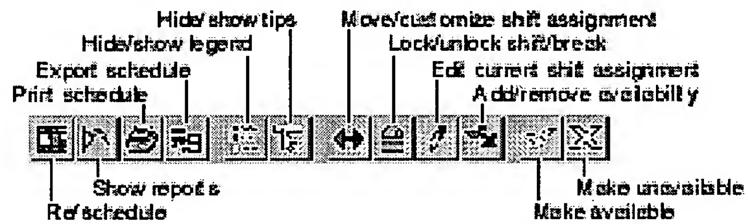
### *To edit or delete an existing meeting*

To edit or delete a meeting already scheduled, double-click on the meeting time on the schedule (or right-click on the meeting time, and choose Edit Meeting from the menu that pops up). The Meetings Editor window appears. Edit any of the meeting settings, as described in the previous section, and then click *Schedule meeting* to put them into effect. To delete the meeting from the

schedule, click *Delete meeting*. (To remove an employee from the meeting, select the employee's meeting on the schedule, and then press the Del key.)

## Editing an existing schedule

With the information it is given, PrimeTime does the best job it can to create an employee schedule that closely matches your agent requirements. You, however, may have previous experience or other information that tells you parts of the schedule need to be rearranged. You may know, for example, that a particular employee needs an early lunch break, or that one employee will do better with an early start time than another. So the Workforce Scheduler window provides a toolbar full of editing tools you can use to modify an existing schedule.




### *To hide or show the legend*

To hide or show the legend in the Workforce Scheduler window, click the *Hide/show legend* tool. This tool reverses the current legend setting, hiding it if it's currently shown or showing it if it's currently hidden.

### *To hide or show tips*

To hide or show the tips in the Workforce Scheduler window, click the *Hide/show tips* tool. This tool reverses the current tips setting, turning them off if they're currently on or turning them on if they're currently off. When the tips are on and you move the mouse pointer over a shift pattern or break on the schedule, the tips pop up on the screen to display the name of the shift pattern or break, plus any descriptive comments you have added.

### *To move or customize a shift or break*

To move an employee's shift assignment or break to an earlier or later time in the day, click on the *Move/customize shift assignment* tool (the double-headed arrow), and then click on the colored portion of the employee's shift schedule and drag it either left (earlier) or right (later). If you click and drag on a blue

work time in the shift, the whole shift pattern will move. If you click and drag on a break time, only that break will move.

When you move an employee's work time, PrimeTime automatically locks the work time but not the breaks. When you move a break, PrimeTime locks the break you moved and the work time but not the other breaks. Normally, that's what you want, to avoid having the changes altered when you reschedule the day. However, you can unlock the work time or breaks with the *Lock/unlock* tool (or right-click the locked time, and select Unlock from the menu that pops up).

### *To lock or unlock a shift or break*

At times, you may need to lock an employee's work times or break times in place, to make sure that they're not altered when you reschedule the day. (Note that when you lock a break in an employee's shift assignment, PrimeTime also locks the work time in that shift assignment but not the other breaks.)

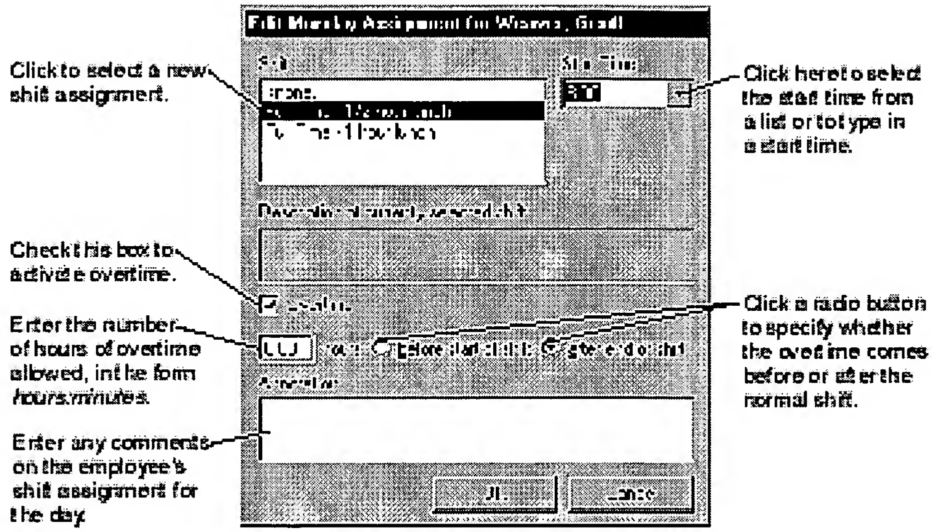
To lock or unlock a shift or break, click the *Lock/unlock* tool (the padlock), and then click on the shift or break you want to lock or unlock. (Or you can right-click the shift or break, and then choose Lock/Unlock from the menu that pops up.) The *Lock/unlock* tool reverses the setting of whatever you click on, so an unlocked break becomes locked, and a locked break becomes unlocked.

**Note** *When you lock a shift assignment or break, you remove it from PrimeTime's control by preventing PrimeTime from moving the shift assignment or break when it reschedules. Each locked shift assignment or break reduces flexibility in scheduling. Too many locked items will reduce the efficiency of your schedule.*

### *To edit an employee's shift assignment (including overtime)*

You can also make changes to an employee's current shift assignment—select a new shift pattern or start time, or set overtime hours. To edit a shift assignment, double-click on the employee's work time, or click on the *Edit current shift assignment* tool, and then click on the scheduled time of the employee whose shift you want to edit. The Edit Shift Assignment window appears.

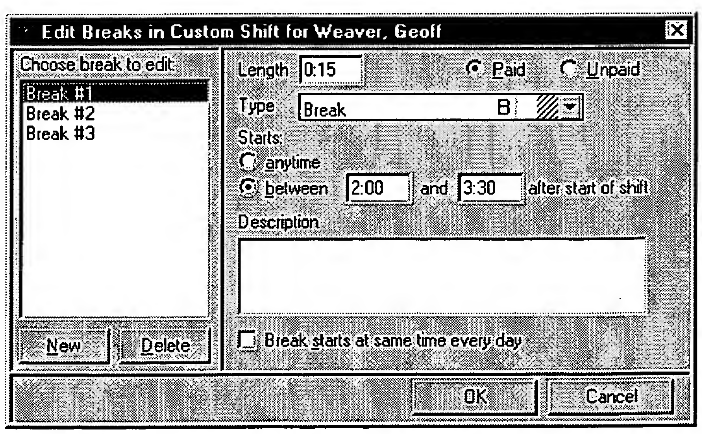
To assign a new shift pattern for this employee, click on a pattern in the *Shift* box to select it. To assign a new start time, click on the arrow by the *Start Time* box to display the list of available times, and choose a new time from the list.




To assign overtime hours for this employee, first click the *Overtime* box so that it's checked. Then click in the *hours* box, and enter the number of overtime hours, in the form *hours:minutes* (1 hour 30 minutes = 1:30). Finally, click one of the two radio buttons to specify whether the overtime hours should be assigned before the normal shift starts or after the shift ends.

### *To edit an employee's breaks*

You can make changes to an employee's scheduled breaks, creating a custom shift assignment for the day for that employee, without affecting the breaks of other employees. To edit an employee's breaks, double-click on any break in the employee's shift assignment, or right-click on the employee's shift assignment and select Edit Breaks from the menu that appears. The Edit Breaks in Custom Shift window appears.



The options in this window are the same as those in the standard Edit Breaks window. (See "Editing breaks" in Chapter 5.) However, any changes made here apply only to the shift assignment of the selected employee on the current day.

### *To stretch a shift or break*

It's also possible to stretch an employee's scheduled shift or break, making the shift or break longer or shorter than specified in the shift pattern without changing the pattern itself. The result is a custom shift assignment for the selected employee on the current day.

With the *Move/customize shift assignment* tool selected (not the *Edit current shift assignment* tool), click once on an employee's shift or break to select it. The shift or break is highlighted with a heavy black border. Move the mouse to the left or right edge of the selected shift or break, until the mouse pointer turns into a double-headed arrow. Then drag with the mouse to lengthen or shorten the shift or break. Once you have customized a shift or break this way, it is locked automatically. (A customized shift can't be unlocked, only removed.)

### *To edit employee availability*

If you need to edit an employee's availability, you can do so using the availability tools on the tool bar:


To change an employee's availability:

**1** Click the *Add/remove availability* tool.

**2** Click on a time block in the employee's schedule to select it. You can also click and drag to select more than one block or click on the employee's name to select the entire day.

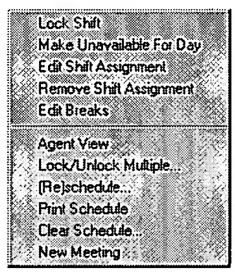
**3** If the employee is available during the selected time, the *Make unavailable* button will be active. Click the *Make unavailable* button to make the selected time unavailable.

**4** If the employee is unavailable during the selected time, the *Make available* button will be active. Click the *Make available* button to make the selected time available.

Note that if you make an employee's already scheduled work time or break time unavailable, you invalidate the employee's shift pattern assignment, so the employee will now show as unscheduled. Use the *Edit current shift assignment* tool to assign the employee a shift pattern, if necessary.

## Using the Workforce Scheduler menu

If you right-click on any part of an employee's schedule, PrimeTime will pop up a menu of options. Some of these options are available elsewhere in the Workforce Scheduler window; others are available only through this menu.



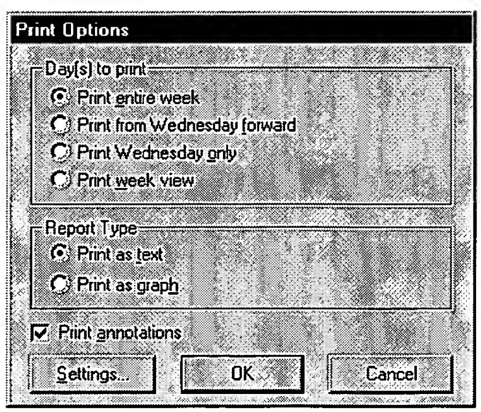

| | |
|---|---|
| **Lock/Unlock Shift/Break** | Lock or unlock the selected shift assignment or break. Same as *Lock/Unlock* tool. |
| **Make Unavailable For Day** | Make the selected employee unavailable for the entire day. |
| **Edit Shift Assignment** | Edit the shift assignment of the selected employee. Same as *Edit current shift assignment* tool or double-clicking the employee's shift assignment. |
| **Remove Shift Assignment** | Remove the selected employee's shift assignment, leaving the employee unscheduled for the day. |
| **Edit Breaks** | Edit the breaks of the selected employee's shift assignment, creating a custom shift assignment for the day. Same as double-clicking one of the employee's breaks. |
| **Agent View** | Display the week's schedule for the selected employee. Same as double-clicking the employee's name. |
| **Lock/Unlock Multiple** | Lock or unlock shifts or breaks for all employees at once. |

| | |
|---|---|
| **(Re)schedule** | Have PrimeTime create or recreate the schedule, using the current settings. Same as *Re/schedule* button. |
| **Print Schedule** | Print the current schedule. Same as *Print schedule* button. |
| **Clear Schedule** | Clear all assignments from the current schedule for the day, for the rest of the week, or for the entire week. |
| **New Meeting/Edit Meeting** | Open the Meetings Editor to schedule a new meeting. If you right-click on an existing meeting, this option changes to Edit Meeting so that you can alter the meeting settings or delete the meeting entirely (same as double-clicking the meeting on the schedule). |

## Printing a schedule

To print the current schedule:

1 Click the *Print* button in the Workforce Scheduler window. The Print Options window appears.




2 In the *Day(s) to print* section, click a radio button to print the schedule for the entire week, from the current day to the end of the week, or for the current day only. Or click the *Print week view* radio button to print a summary view of the week that shows only the start and end times for each employee.

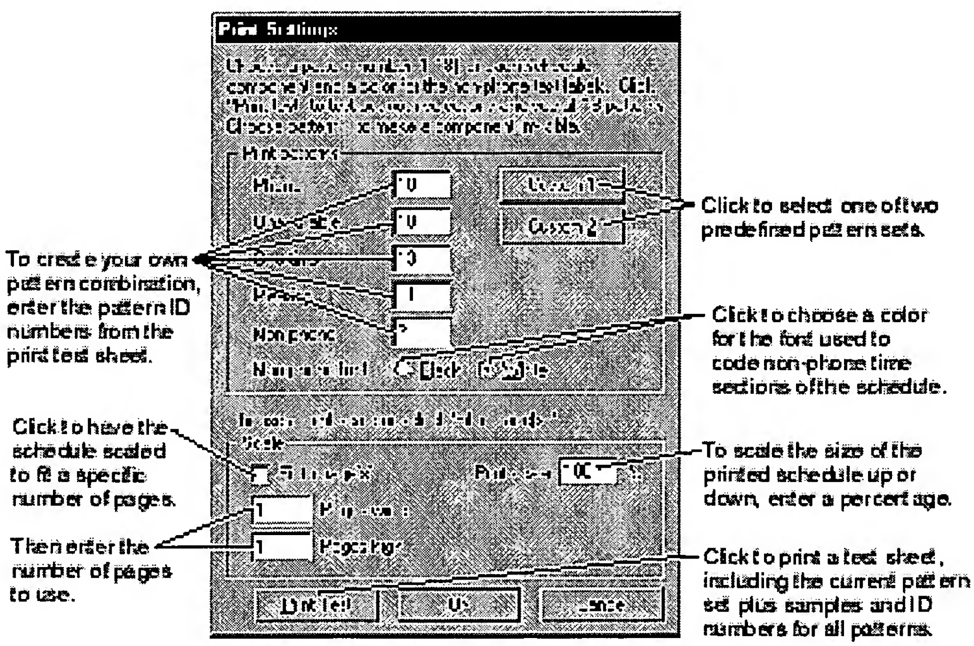
3. In the *Report Type* section, click a radio button to print the schedule as a graph (similar to what you see on the screen) or as text (using numbers instead of graph bars).
4. Click the *Print annotations* checkbox to enable it if you want any annotations printed along with the schedule.
5. Click *OK*. The Print window appears.
6. Check the current printer settings to make sure they're correct for your printer, and then click *OK* to begin printing.

### *To change print settings for schedules*

When you print a schedule, PrimeTime converts the color-coded parts to black and white patterns. If you find that the default patterns don't print well on your printer, you can alter them through the Print Settings window. In this same window, you can also scale the printed schedule up or down.

To change the print settings:

1. In the Print Options window (which appears when you click the Workforce Scheduler *Print* button), click the *Settings* button. The Print Settings window appears.



2 Make sure your printer is on, and then click the *Print Test* button. PrimeTime will print a test sheet that includes:

- A sample of the schedule with the currently-selected print patterns.
- Samples of all 18 available print patterns with the ID number for each.

3 PrimeTime provides two default pattern sets—Custom 1 and Custom 2—which will print well on most printers. Click *Custom 1* or *Custom 2* to select one of these patterns, and then run the print test in step 2 again.

4 If neither of the preset custom patterns gives good results, you can select individual print patterns yourself. Using the ID numbers from the test sheet in step 2, enter pattern numbers in the *Phone*, *Unavailable*, *Overtime*, *Meeting*, and *Non-phone* boxes. Then click the *Black* or *White* radio button to set the color used to print the letter codes on the different patterns.

5 Run the print test in step 2 again. (Make sure you enter a different pattern number in each box.) Repeat these steps until you find a pattern combination that works well with your printer.

6 To change the size of the printed schedule, you can enter a percentage by which to scale the printout in the *Print scale* box.

Or you can click the *Fit to page(s)* box, which automatically scales the printout to fit one or more pages. Enter the number of pages you want the schedule to cover in the *Pages wide* and *Pages high* boxes.

7 Click *OK* to close the Print Setup window and save the current selections.

## VIEW REPORTS

Once you have created a forecast and a schedule, you can view reports to evaluate your results. As you accumulate data during the week, you can return to these reports to see if you need to make adjustments. You can also print reports or export them to a variety of file formats, as described later in this section.

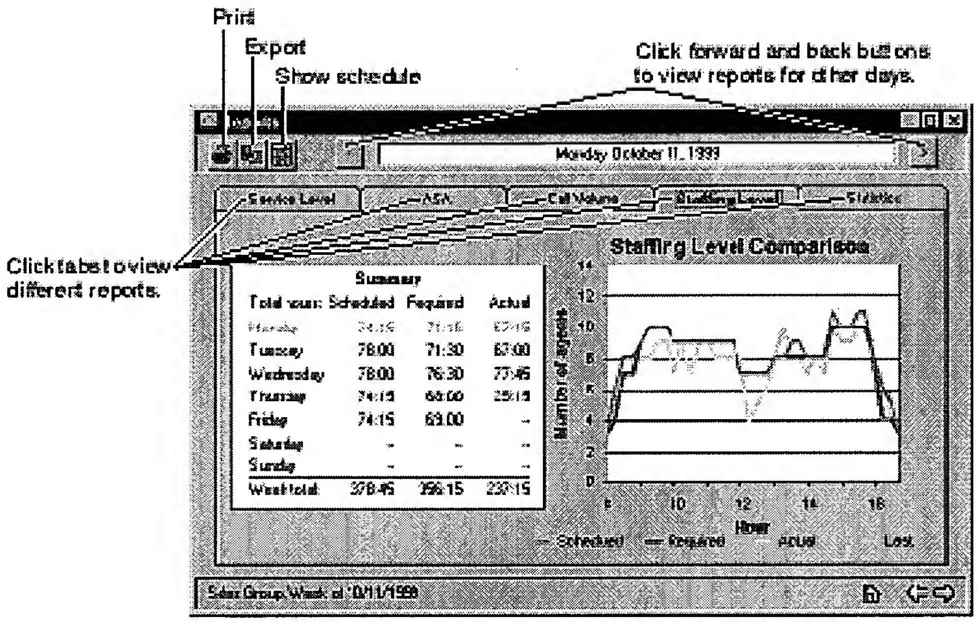
**Note** *You can get another view of your call center performance through PrimeTime Pulse, a separate program installed along with PrimeTime. See Chapter 8 for information on using PrimeTime Pulse.*

PrimeTime offers the following reports:

| | |
|---|---|
| **Service Level** | Compares your desired service level (% of calls answered in a certain time) to your predicted service level, based on your staffing, call volume, and other data. Also displays your actual service level if call volume data has been entered. Note that if you specified your service goal as ASA, then only the predicted service level appears on this graph. |
| **ASA (Average Speed to Answer)** | Compares your desired ASA to your predicted ASA, based on your staffing, call volume, and other data. Also displays your actual ASA if call volume data has been entered. Note that if you specified service level as your service goal, then only the predicted ASA appears on this graph. |
| **Call Volume** | Compares your call volume forecast to your actual call volume, based on call volume data entered into PrimeTime during the course of the week. If you have not entered your actual call volume data yet, it will be displayed as zero. |
| **Staffing Level** | Compares your scheduled staffing level to your required staffing level, based on your predicted agent requirements. Also displays your actual staffing level if call volume data has been entered. |
| **Statistics** | Provides summary statistics by day and by agent for over- and understaffing levels and for time (phone, non-phone, paid, unpaid, overtime). |

To view reports for the current week, click the Reports icon on the Schedule tab of the Home screen. The Reports window appears.

To view the different reports available, click on the tabs in the Reports window. (Service Level, ASA, Call Volume, Staffing Level, Statistics). To view reports for different days of the current week, click the forward and back buttons at the top of the window, or click a day in the *Summary* box.




As a result of what you see in these reports, you may want to revise your schedule or forecasts to get a better fit.

To open the Workforce Scheduler window in order to revise the schedule, click the *Show schedule* button on the toolbar.

**Tip**

> *You can keep the Reports window and the Workforce Scheduler window open at the same time, even in the Wizard view. The Reports window will be updated automatically as you make changes in the Workforce Scheduler window.*

To revise the call volume forecasts, click the *Home* button at the bottom of the window to return to the Home screen, and then click the Forecast tab to begin revising your forecasts.

To export the current report to a text file, in any of a variety of formats, click the *Export* button on the toolbar.

To print the current report, click the *Print* button on the toolbar.

Chapter 8

# Using PrimeTime Pulse

This chapter covers PrimeTime Pulse, an additional application that's installed along with the PrimeTime F&S client. To help you track your call center performance, PrimeTime Pulse collects your call center data throughout the day, as it's entered from the ACD, and provides a new view of this data. Unlike the PrimeTime F&S reports, which display the actual numbers for your required or predicted values and your actual performance, PrimeTime Pulse can display the deviation of your actual performance from your required or predicted values. Through its ongoing collection of data and highlighting of deviations, PrimeTime Pulse enables you to quickly analyze your performance throughout the day and take corrective action when needed.

This chapter includes information on the following:

- **PrimeTime Pulse display**: Viewing the PrimeTime Pulse display.
- **Interpretation**: Making sense of the information PrimeTime Pulse gives you.
- **Help**: Getting help, finding version information, and using Examples Mode.
- **Startup**: Starting PrimeTime Pulse, selecting the group and day to view.
- **Options**: Setting options for viewing the PrimeTime Pulse display.

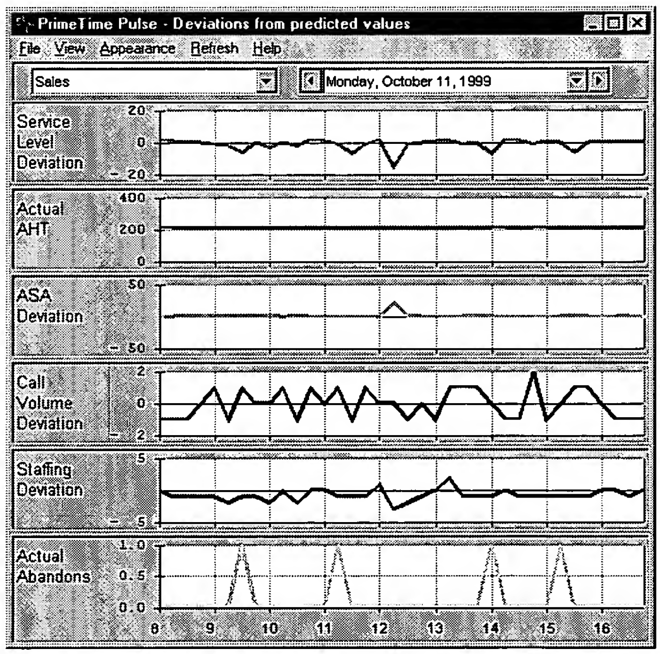
## THE PRIMETIME PULSE DISPLAY

PrimeTime Pulse can display information on six items: service level, AHT (average handling time), ASA (average speed to answer), call volume, staffing, and abandons. By default, PrimeTime Pulse displays the information in graph form, though it can also display the information as a table.

The information that PrimeTime Pulse displays about these items is the deviation—that is, the difference—between the actual numbers recorded in your call center and either the predicted or the required numbers generated by PrimeTime F&S.

**Deviations from predicted values** — Indicate the difference between the actual numbers recorded in your call center and the numbers PrimeTime has predicted or scheduled, given the information on forecasts, staffing, schedules, etc., that you've entered.

**Deviations from required values** — Indicate the difference between the actual numbers recorded in your call center and your service goals or the numbers PrimeTime says are required to meet those goals.




To understand the PrimeTime Pulse display, it's important to know what a positive or negative deviation indicates for each of these items. Note that in cases where displaying a deviation makes no sense, PrimeTime Pulse instead displays the actual numbers rather than a deviation, as shown in the following:

**Service level** — Positive deviation indicates a service level higher (better) than predicted or required. Negative deviation indicates a lower (worse) service level. If you've chosen ASA as your service goal, then the service level graph displays the actual service level numbers when *Deviation from required values* is selected.

| | |
|---|---|
| **AHT (average handling time)** | Positive deviation indicates an AHT higher (longer) than predicted or required. Negative deviation indicates a lower (shorter) AHT. Note: When *Deviation from predicted values* is selected, this graph displays the actual AHT numbers, not the deviation. |
| **ASA (average speed to answer)** | Positive deviation indicates an ASA higher (longer) than predicted or required. Negative deviation indicates a lower (shorter) ASA. If you've chosen service level as your service goal, the ASA graph displays the actual ASA numbers when *Deviation from required values* is selected. |
| **Call volume** | Positive deviation indicates a higher call volume than predicted. Negative deviation indicates a lower call volume. When *Deviation from required values* is selected, this graph displays the actual call volume, not the deviation. |
| **Staffing** | Positive deviation indicates staffing is higher than predicted or required (overstaffed). Negative deviation indicates staffing is lower (understaffed). |
| **Abandons** | Positive deviation indicates abandons are higher than required (more abandons). Negative deviation indicates abandons are lower (fewer abandons). Note: When *Deviation from predicted values* is selected, this graph displays the actual number of abandons, not the deviation. |

## WHAT PRIMETIME PULSE CAN TELL YOU

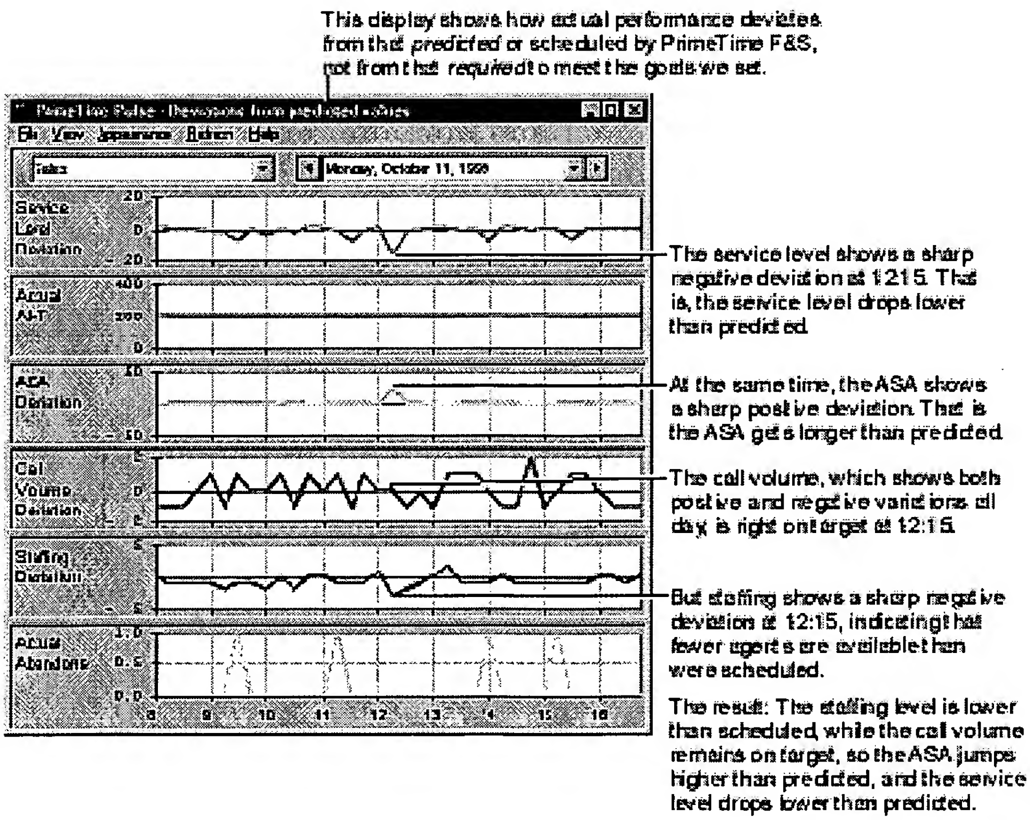
PrimeTime Pulse's function is to help you track the performance of your call center by displaying the deviation between your actual performance numbers and the numbers generated in PrimeTime F&S.

As mentioned in the previous section, PrimeTime Pulse can compare your actual data either to your *required* values or to your *predicted* values. *Required* values are the numbers that represent your service goals or the numbers you need in

order to meet those goals, whether or not you can achieve them with the resources you have. *Predicted* values are the numbers PrimeTime says you should actually get, given the staff, forecasts, schedules, and other information you've entered.

What PrimeTime Pulse then displays for you is not the actual numbers vs. the required or predicted numbers, as you would see in the Reports section of PrimeTime F&S. Instead, PrimeTime Pulse displays the *deviation* of the actual numbers from the required or predicted numbers. In other words, PrimeTime Pulse displays the difference between two sets of numbers, not the numbers themselves. By displaying the deviation, PrimeTime Pulse allows you to see at a glance where you are underperforming or overperforming.

Take a look at the following screenshot, for example, which shows the graph view of the data for a particular group and day:



First, from the title at the top of the window, note that this graph is displaying deviations from predicted values—that is, from those values PrimeTime F&S has predicted we should get.

Next, in the topmost graph, the service level shows a sharp negative deviation at 12:15—the service level suddenly drops well below predictions. It's a short, sharp spike, as the service level deviation returns to near zero at 12:30.

In the third graph down, the ASA shows a sharp positive deviation at 12:15—the average speed to answer suddenly gets longer than predicted. It, too, returns to a near-zero deviation by 12:30.

**Tip**

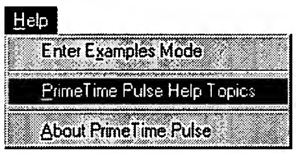
*When comparing graphs in PrimeTime Pulse, don't get caught up in comparing the amplitude of the graph spikes too literally. Note that the scale used will vary from graph to graph. In the screenshot shown earlier, for example, the graph for ASA has a range from -50 to +50, while the graph for staffing has a range from -5 to +5. Also a negative deviation of one is unlikely to be significant in ASA, but it could be very significant in staffing.*

Did something happen to the call volume at 12:15? In the fourth graph down, the call volume shows near zero deviation at 12:15, even though it wobbles up and down the rest of the day. That tells us that, at 12:15, the actual call volume matched the predicted call volume. Note that it doesn't tell us whether the call volume went up or down—we'd have to look at the actual numbers for that. It does tell us that, up or down, the call volume matched what PrimeTime forecast. Because of that, we might expect the service level to match the predicted also, but it doesn't.

In the fifth graph down, however, the staffing also shows a sharp negative deviation at 12:15, indicating that we had fewer agents available than PrimeTime had scheduled. So when the staffing level dropped lower, but the call volume remained on target, the ASA jumped higher than predicted, and the service level dropped lower than predicted.

In order to evaluate what you see, you may also want to refer to the numbers themselves, as shown in the Actual Values view or in the PrimeTime F&S reports. (See "To view actual values" later in this chapter for information on the Actual Values view.) Again, a negative deviation of one in staffing might have some effect if you had six agents scheduled, but it could be a disaster if you had only two agents scheduled.

## GET HELP




To get online help at any time while using PrimeTime Pulse, press the F1 key, or choose PrimeTime Pulse Help Topics from PrimeTime Pulse's Help menu.

### Finding version information

To find the version number of your current copy of PrimeTime Pulse, choose About PrimeTime Pulse from the Help menu.

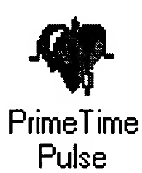
### Using Examples Mode

Like PrimeTime F&S, PrimeTime Pulse offers a special Examples Mode for you to use while learning or exploring its features. Examples Mode provides sample data for you to work with as part of the Tutorial group data used in Chapter 3.

To enter Examples Mode, choose Enter Examples Mode from the Help menu. PrimeTime Pulse will display the first day of the sample PrimeTime Pulse data (10/11/1999) in the Tutorial group. The PrimeTime Pulse window will display the selected group and day in red, to indicate that you are in Examples Mode

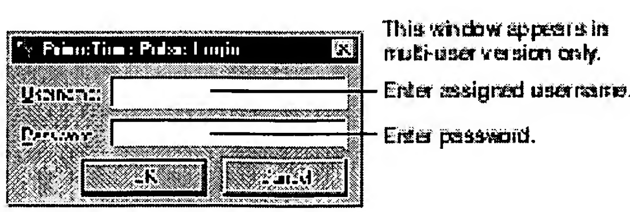
To exit Examples Mode and return to PrimeTime Pulse's normal working mode, choose Exit Examples Mode from the Help menu. The PrimeTime Pulse window will then display the selected group and day in black rather than red.

## START PRIMETIME PULSE




To start PrimeTime, double-click the PrimeTime Pulse icon on your desktop, or choose PrimeTime Pulse from the PrimeTime F&S (Client) folder on the Windows Start menu. (In Windows NT 3.51, double-click the PrimeTime Pulse icon in the Program Manager.)

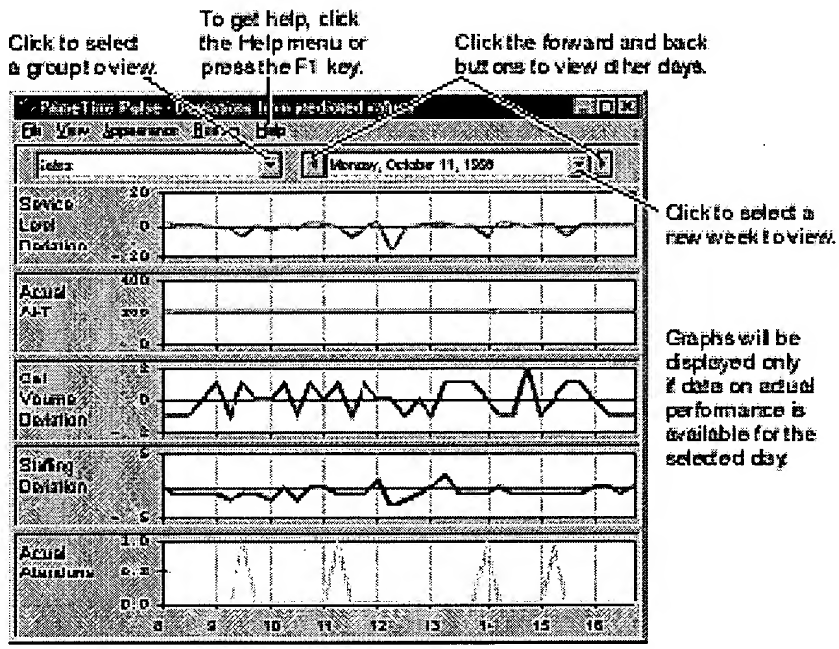
If you're using the multi-user version of PrimeTime, you'll see the PrimeTime Pulse Login window. (In the single-user version, you won't see this window.)



Enter your username and password, and then click *OK*. (Usernames and passwords can only be assigned by the PrimeTime Administrator account.)

**Note** *PrimeTime Administrator: If you have not yet created any user accounts, see "Manage PrimeTime users" in Chapter 9 for instructions.*

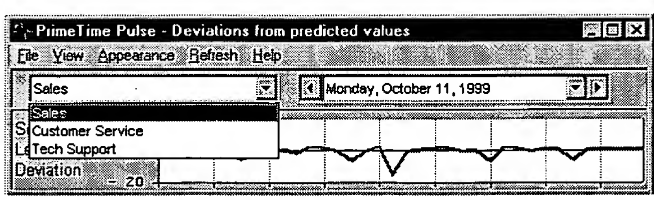
Next, in both the multi-user and single-user versions, PrimeTime will display its main window, which is the same in both versions.




## Selecting the group and day

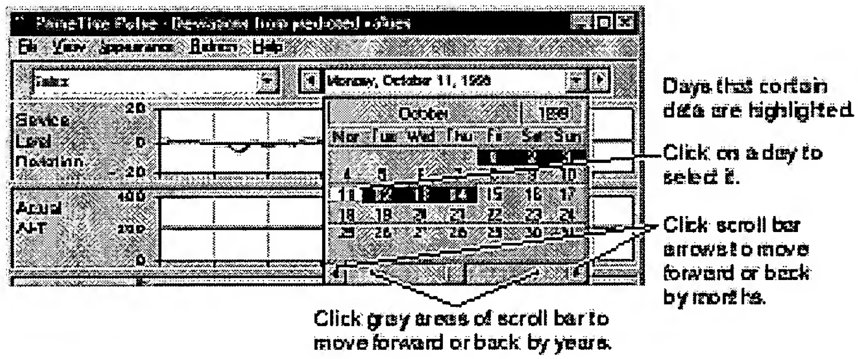
PrimeTime Pulse displays data by group and by day. To select the group and day you want to view:

**1** Click the arrow by group box to display the list of available groups, and then choose a group from the list.




**2** To select a different day in the current week, click the forward and back arrows by the day box.

To select a different week, click the down arrow by the day box. PrimeTime Pulse will display a monthly calendar with the days that contain data highlighted. Use the horizontal scroll bar to move forward and back by months or years. Click on a day to select it.

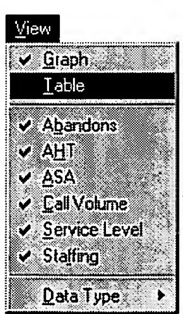



**Note** *Because PrimeTime Pulse displays the deviation between the actual numbers and the predicted or required numbers, it will only display a graph or table if actual data is available for the selected day. If no data is available, the graph or table will be empty.*

## SET DISPLAY OPTIONS

PrimeTime Pulse also allows you to modify its display so that you can see information in the way that suits you best. Among other things, you can choose a graph or table view, and you can choose to see deviations from your predicted values or from your required values.

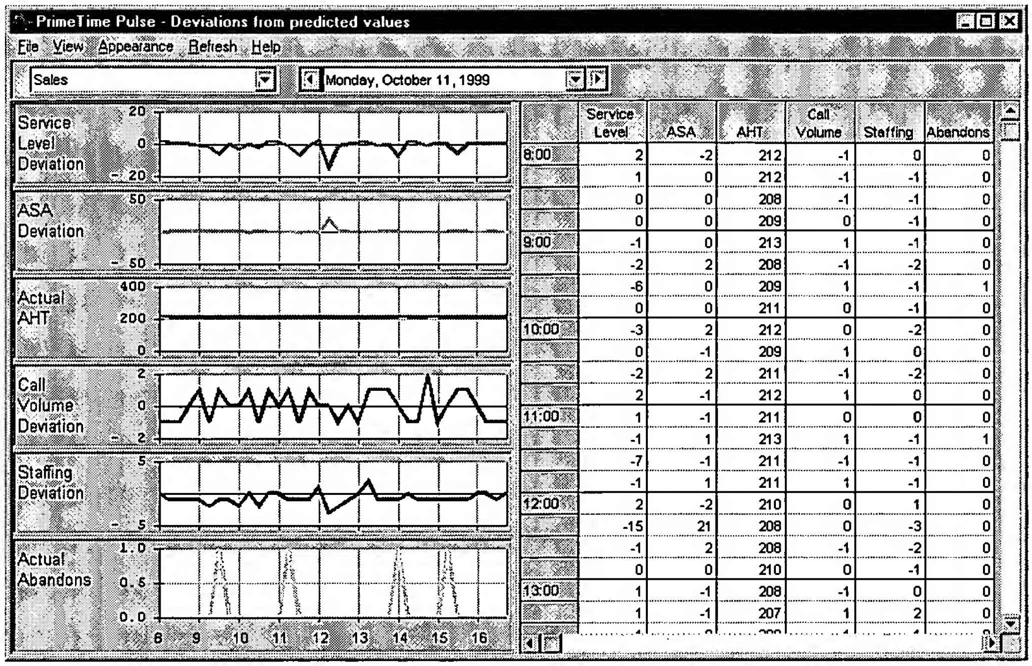
### Selecting graph or table view




PrimeTime Pulse can display its information in a graph view, as shown earlier, or in a table view. PrimeTime Pulse can also display the graph and table views at the same time, as shown below.

To display the graph or table view if it is not already showing, click the View menu, and choose Graph or Table, respectively. The selected item will now be checked on the menu, and PrimeTime Pulse will display the corresponding view.

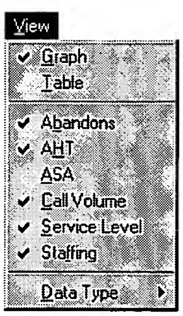
To turn off the display of either view, just select the item from the View menu again.




## Selecting the items to display

PrimeTime Pulse can display information for six items:

- Service Level
- ASA (Average Speed to Answer)
- AHT (Average Handling Time, which is the total of the talk time plus the after-call wrapup time)
- Call Volume
- Staffing
- Abandons (Calls abandoned by caller before agent answered)

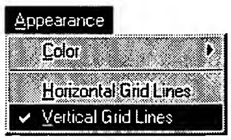



By default, PrimeTime Pulse displays five of the six items, omitting either service level or ASA, depending on what you have chosen as your service goal. However, you can display as many or as few of the six items as you want. To turn off an item, select it from the View menu. To display the item once again, just select it from the View menu again.

**Tip**

*You can rearrange the order of the items in either graph or table view by clicking and dragging the item you want to move. You can also resize any graph by dragging the upper or lower border of its cell with the mouse.*

### *To add or remove grid lines in the graph view*




For easier reading, PrimeTime Pulse can display horizontal and vertical grid lines on its graphs. To turn off the display of horizontal or vertical grid lines, choose Horizontal Grid Lines or Vertical Grid Lines from the Appearance menu. To turn on the display once more, choose the corresponding item from the Appearance menu again. By default, only the vertical grid lines are displayed.

### *To change the graph colors*

To change the color used to display the graph for an item, click the Appearance menu, point to Color, and then from the menu that pops up, choose the item whose graph color you want to change. PrimeTime Pulse will open the Color window, in which you can select one of 48 basic colors. You can also define a custom color by clicking the *Define Custom Colors* button.

**Tip**

> *You can open the Color window directly by double-clicking on a graph label in the PrimeTime Pulse window.*

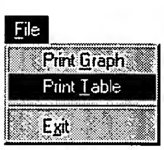
### *To refresh the information displayed*

By default, PrimeTime Pulse automatically refreshes its data at regular intervals, to ensure that its display is up-to-date.

If you want to stop PrimeTime Pulse from automatically refreshing its data for some reason, choose Automatic Refresh from the Refresh menu. The menu item will then be unchecked, and PrimeTime Pulse will not refresh its data. To turn automatic refresh back on again, choose Automatic Refresh from the Refresh menu a second time.

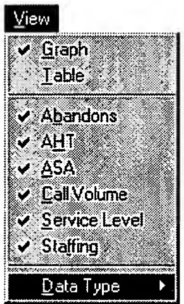
If you want to force PrimeTime Pulse to refresh its data right now—either because you have turned off automatic refresh or because you want to be sure the data you see this instant is current—then choose Refresh Now from the Refresh menu, or press the F5 key.

### *To print the information displayed*




To print the information displayed in PrimeTime Pulse as a graph, choose Print Graph from the File menu. To print the information displayed in PrimeTime Pulse as a table, choose Print Table from the File menu. PrimeTime Pulse will print the data as you see it on the screen.

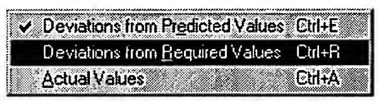
## Comparing actual to required or predicted values




You can compare your actual data either to your *required* values (your service goals or the numbers PrimeTime says you need to meet those goals) or to your *predicted* values (the numbers PrimeTime predicts you will have, given the staffing, forecasts, schedule, etc., that you have entered).

To display the deviation from your predicted numbers, click the View menu, point to Data Type, and choose Deviation from Predicted from the menu that pops up. Or you can use the keyboard shortcut, Ctrl+E.

To display the deviation from your required numbers, click the View menu, point to Data Type, and choose Deviation from Required from the menu that pops up. Or you can use the keyboard shortcut, Ctrl+R.




Even when you have selected Deviation from Predicted or Deviation from Required, PrimeTime Pulse will display the actual value for an item if displaying the deviation does not make sense. For example, if you select Deviation from Required, PrimeTime Pulse will display the actual call volume numbers rather than a deviation, because there is no "required" call volume to deviate from. If you select Deviation from Predicted, on the other hand, PrimeTime Pulse will display the deviation from the call volume predicted by your forecast.

### *To view actual values*

If you want to see the actual values for a moment, rather than the deviations, click the View menu, point to Data Type, and choose Actual Values from the menu that pops up. Or you can use the keyboard shortcut, Ctrl+A.

Chapter 9

# Managing Users, Files, and Data

This chapter covers basic maintenance tasks for PrimeTime—managing users in a multi-user environment, backing up files, and importing and exporting data. It includes sections on:

- **User management**: Using PrimeTime User Manager to add users, delete users, and set user access permissions. (For multi-user version only.)
- **File maintenance**: Saving, backing up, and restoring PrimeTime data.
- **Data import and export**: Importing and exporting a variety of PrimeTime data, including employee information, call volume data, and reports.

## MANAGE PRIMETIME USERS

The multi-user version of PrimeTime includes the PrimeTime User Manager, which allows you to add and delete PrimeTime users, set or change the users' access permissions for various groups, and change user passwords.

### The Administrator account

The multi-user version of PrimeTime is installed with only one account set up—the Administrator account, which has read/write access to all PrimeTime groups. Only the Administrator account can use PrimeTime User Manager.

The username for the Administrator account is

Administrator

The default password for the Administrator account is

password

**Important!** *As soon as you have installed PrimeTime, you should immediately use PrimeTime User Manager to change the Administrator password to a secure password known only by those people who should have Administrator access to*

*PrimeTime. See "To change a name or password" later in this chapter for instructions on using PrimeTime User Manager to change passwords. DO NOT, under any circumstances, leave the Administrator password set to the default.*

*Also, be sure to record the new Administrator password in a safe place. If you lose the Administrator password, contact Blue Pumpkin Software for assistance.*

### Working with PrimeTime User Manager

PrimeTime User Manager is usually installed on the PrimeTime server.

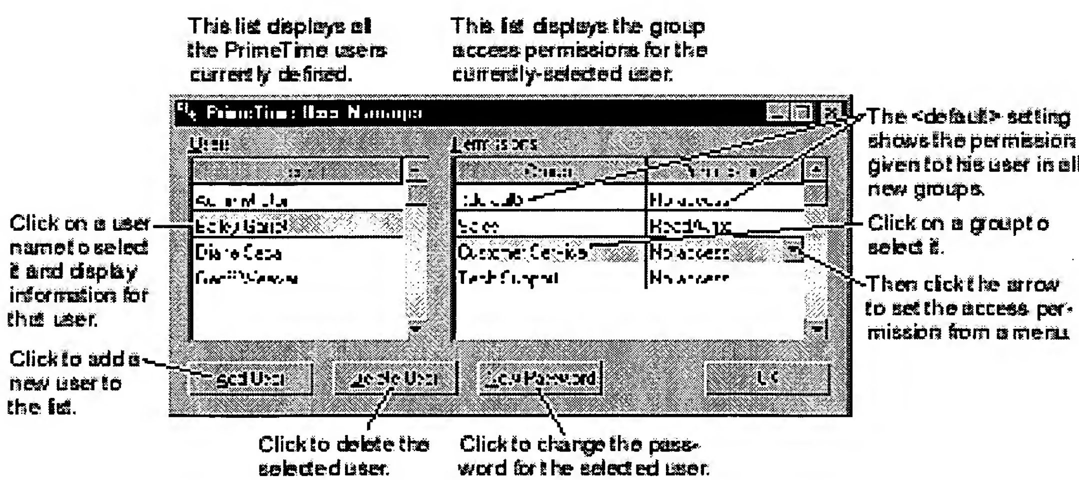
**Note** *While User Manager is running, users won't be able to log in to PrimeTime. Be sure to quit User Manager as soon as you finish making changes.*

To start PrimeTime User Manager:

PrimeTime User Manager

1. Choose PrimeTime User Manager from the PrimeTime folder on the Windows Start menu. (In Windows NT 3.51, double-click the PrimeTime User Manager icon in the Program Manager.)
2. User Manager will display its login window. Enter the Administrator password, and click *OK*.

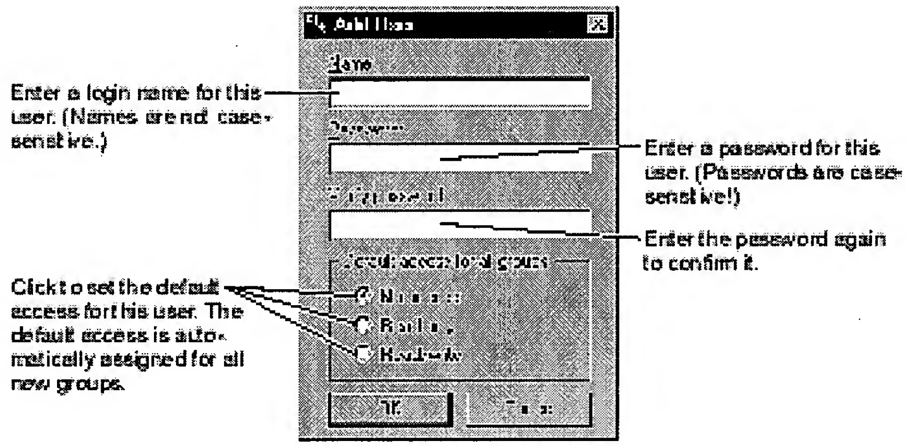

3. The User Manager window will appear, listing all the PrimeTime user accounts currently defined.



### ***To add or delete a user***

To add a new PrimeTime user:

**1** In PrimeTime User Manager, click *Add User*. The Add User window will appear.




**2** In the *Name* box, enter a login name for the new user. This name is not case-sensitive.

**3** In the *Password* box, enter a password for the user. For security, your typing will appear as asterisks (*). The password is case-sensitive.

**4** In the *Verify password* box, re-enter the password to confirm that you typed it correctly.

**5** In the *Default access for all groups* section, click a radio button to select *No access* (user cannot open group), *Read only* (user can open group but not make changes), or *Read/write* (user can open group and make changes). This setting determines the default access permission the user will be automatically assigned for all new groups. You can always change the user's access to specific groups as described later.

If you do not want users to have access to all groups, you may wish to set the default to *No access* and then give individual users read-only or read/write access to specific groups as required.

**6** Click *OK* to close the window. The new user will now appear in the *Users* box in the User Manager window.

To delete a user:

1 In PrimeTime User Manager, click the user's name in the *Users* box to select it.

2 Click *Delete User* to delete the selected user.

3 User Manager will ask you to confirm the deletion. Click *Yes* to delete the user or *No* to cancel the deletion.

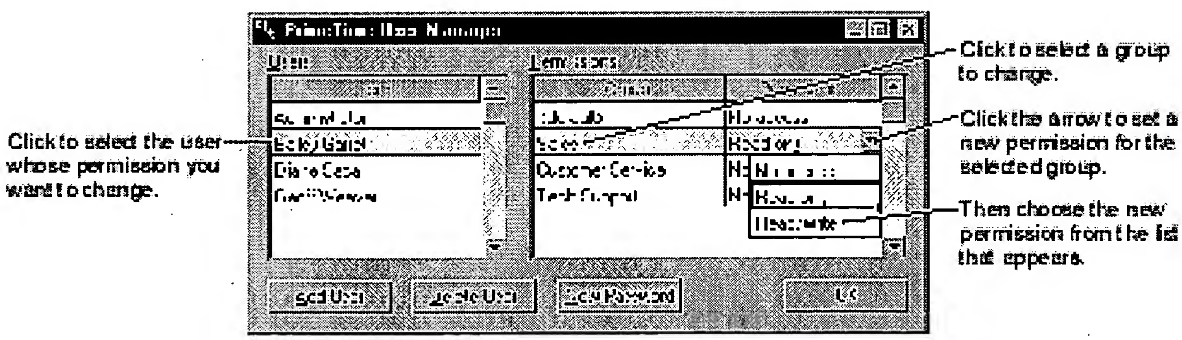
### *To set group access permissions*

To set group access permissions for a PrimeTime user:

1 In PrimeTime User Manager, click the user's name in the *Users* box to select it. The *Permissions* box will list the user's access permission for every group.

2 To change the user's permission for a specific group, click on the group to select it, and then click on the arrow that appears next to the permission for that group.

3 From the list that appears, choose the permission you want—*No access*, *Read only*, or *Read/write*. The User Manager window will display the new setting.



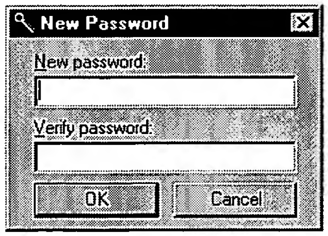

### *To change a name or password*

To change the name or password of a PrimeTime user:

1 In PrimeTime User Manager, click on the name of the user in the *Users* box to select it.

2 To change the selected user's login name, press the Enter key, edit the name as desired, and press the Enter key again to make the change. (Note that you can't change the name of the Administrator account.)

**3** To change the selected user's password, click *New Password.* The New Password window will appear.



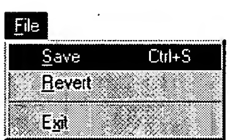

**4** In the New Password window, enter the new password in the *New password* box, and then enter it again in the *Verify password* box to confirm it.

**5** Click *OK* to accept the changes and close the New Password window.

## SAVE AND RESTORE DATA

PrimeTime stores your data—including forecasts, schedules, employee information, call volume information, and so on—in standard database files so that you can easily import and export data, save and archive files, and so forth.

### Saving your current data



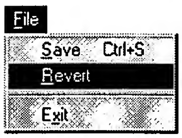

To save your data in its current state, choose Save from the File menu on PrimeTime's Home screen, or press Ctrl+S in any PrimeTime window.

If you make changes in PrimeTime and then try to quit without saving them, PrimeTime will ask if you want to save the changes.

**Tip**

| |
|---|
| *Save often when you're making changes in PrimeTime—at least every 10 minutes. While PrimeTime can prompt you if you try to quit without having saved changes, it can't predict loss of data due to power outages, hardware failures, or crashes caused by other software.* |

## Reverting to the last saved data

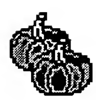



If you start making changes in PrimeTime and then decide you want to reverse them, you can revert to the last saved version of your data. To do so, choose Revert from the File menu on the Home screen. Note that this command only returns to the most recently saved version of your data. If you decide you want to reverse changes after you have saved them, this command won't help. You'll have to try to recover an earlier version of your data from your archive files, or you'll have to reverse the changes by hand.

## Backing up or restoring data

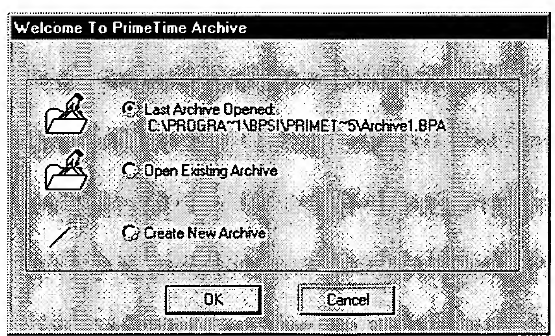
PrimeTime provides a backup program—PTArchive—to create backup copies of your data and to restore data from those backup copies if required. You can back up or restore all data at once (from all weeks and all groups), or you can back up or restore individual groups, weeks, histories, etc.

To open or create a PrimeTime archive:



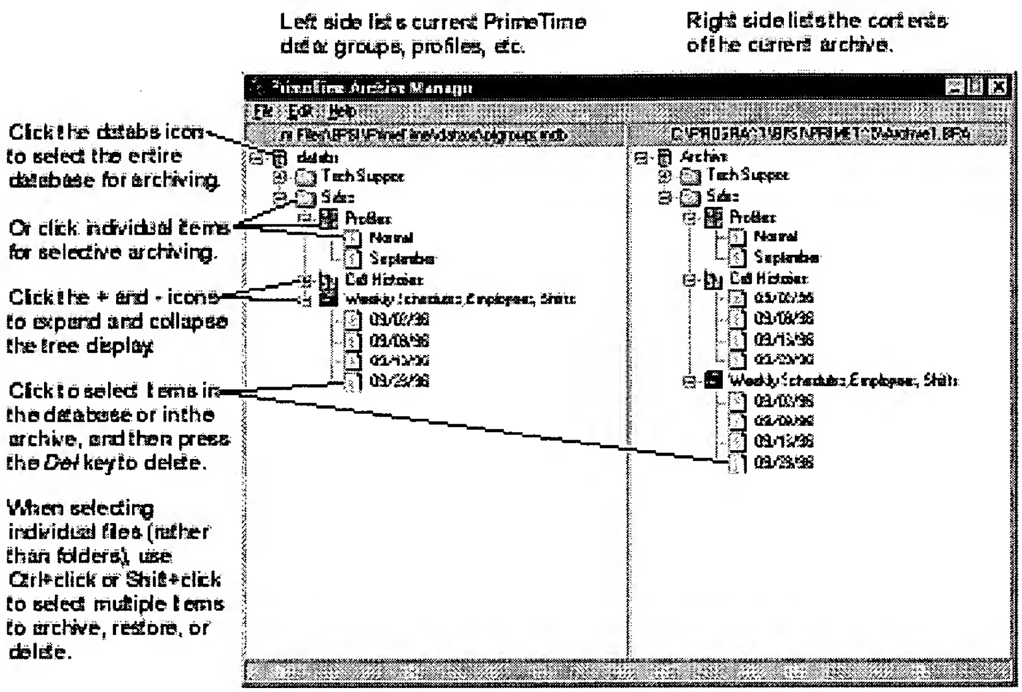
PTArchive

1. In Windows 95 or Windows NT 4.0, choose PTArchive from the PrimeTime folder on the Start menu, or double-click the PTArchive program (ptarchive.exe) in the PrimeTime folder. (In Windows NT 3.51, double-click the PTArchive icon in the PrimeTime program group in Windows Program Manager.)
2. In the Welcome window, click one of the three radio buttons to open the last archive you used, open a different archive, or create a new archive.




3. Click *OK* to open or create the archive. The PrimeTime Archive Manager window appears. Note that the hierarchy displayed in Archive Manager reflects the hierarchy of data in PrimeTime. At the top is the database, which is organized into groups. Each group contains data types—profile data, call history data, and operational data (schedules/employees/shifts). Finally,

each data type contains individual data files—named profiles for profile data, or individual weeks for call history and operational data.




To back up data to an archive:

**1** In the lefthand database panel of the PrimeTime Archive Manager window, select the items to archive. Click the top level databs icon to select all the data, or click individual folder or file icons to select only specific items. If you are selecting individual files, you can select multiple items at once by holding down the Ctrl key when you click.

**2** From Archive Manager's Edit menu, choose Copy to Archive to copy the selected files to the current archive. (Or just drag the selected items with the mouse, and drop them in the righthand archive panel of the window.)

To restore data from an archive:

**1** In the righthand panel of the PrimeTime Archive Manager window, select the items to restore. Click the top level *databs* icon to select all the data, or click individual folder or file icons to select only specific items. If you are selecting individual files, you can select multiple items at once by holding down the Ctrl key when you click.

2 From Archive Manager's Edit menu, choose Restore to Database to copy the selected items to the current PrimeTime database. (Or drag them with the mouse, and drop them in the lefthand database panel of the window.)

To delete data from a database or an archive:

1 In the database or archive panels of the PrimeTime Archive Manager window, select the items to delete. Click the top level *databs* icon to select all the data, or click individual folder or file icons to select only specific items. If you are selecting individual files, you can select multiple items at once by holding down the Ctrl key or Shift key when you click.

2 Press the Del key to delete the selected items. PrimeTime will prompt you if you attempt to delete database items that have not been archived.

**Tip**

*As you work with PrimeTime, the amount of data in your database will grow week by week. To keep this growth under control, you can prune your database by backing up older data to the archive and then deleting it from the database. You can also move the archive itself to a tape backup, for example, or to a network disk to save local disk space.*

## IMPORT AND EXPORT DATA

In PrimeTime, you can import call volume and employee data. You can also export call volumes, profiles, forecasts, agent requirements, schedules, and reports to tabbed text, Excel 5, or HTML files.

### Importing employee information

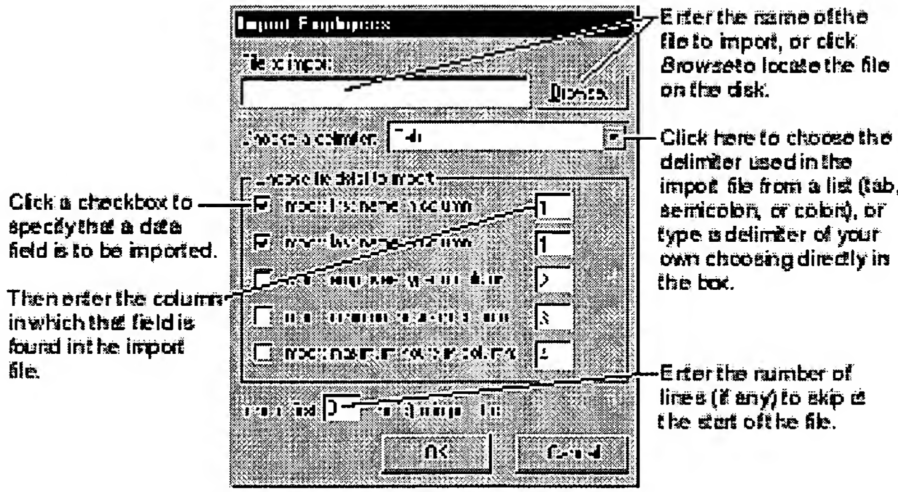
PrimeTime needs certain information about your call center employees. If you have some or all of this information already in text file form, you can import it into PrimeTime and save the work of re-entering it by hand.

To import employee information:

1 Click the Configuration tab on PrimeTime's Home screen.

2 Click the Employees icon to open the Employee Editor window.

3 Click the *Import* button on the window's toolbar. The Import Employees window appears.




**4** Enter the name of the file to import in the *File to import* box, or click *Browse* to locate the file on disk. (See the next section, "About employee import file formats," for information on setting the import options.)

**5** Click on the arrow by the *Choose a delimiter* box to select the delimiter used in the import file from a list (tab, semicolon, or colon), or click in the box itself, and then type in the delimiter you want to use.

**6** In the *Choose field(s) to import* section, click the checkboxes to identify the data fields you want to import from the file. In the corresponding text box, enter the number of the column in which that data appears in the file.

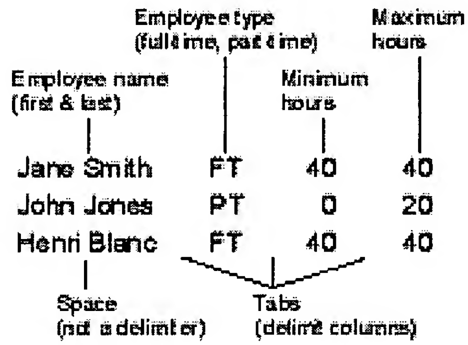
**7** If the file contains irrelevant data at the beginning, you can tell PrimeTime to ignore a specified number of lines at the beginning of the file. Enter the number of lines to ignore in the *Ignore first _ line(s) in import file* box.

**8** Click *OK* to import the file.

### *About employee import file formats*

When importing employee information, PrimeTime expects the data to be arranged in rows and columns in a plain text file. Using the options in the Import Employees window, you can tell PrimeTime what delimiter is used to mark the columns in each row and which columns contain the information to import, as described in steps 5 and 6 of the previous section.

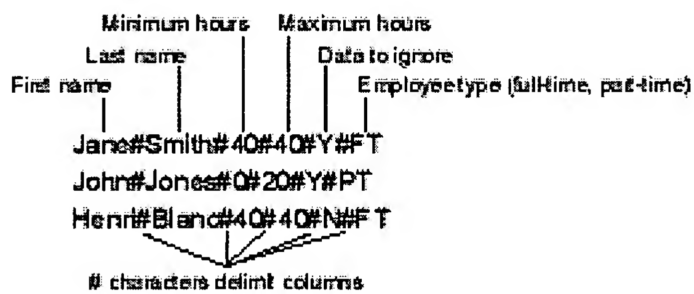
For example, suppose your employee import file looks like this:




In this first case, you would set the import delimiter to *Tab* and set the rest of the import options as follows:

| | |
|---|---|
| *Import first name in column:* | 1 |
| *Import last name in column:* | 1 |
| *Import employee type in column:* | 2 |
| *Import minimum hours in column:* | 3 |
| *Import maximum hours in column:* | 4 |

On the other hand, suppose your employee import file looks like this:




In this second case, you would set the import delimiter to # and set the rest of the import options as follows:

| | |
|---|---|
| *Import first name in column:* | 1 |
| *Import last name in column:* | 2 |
| *Import employee type in column:* | 6 |
| *Import minimum hours in column:* | 3 |
| *Import maximum hours in column:* | 4 |

## Downloading call volume data from ACDs

With custom configuration, it's possible to download data automatically from certain ACDs (automatic call distributors) directly into PrimeTime. ACD utilities are installed along with PrimeTime, in a folder named ACDUtils. See the accompanying ACD utilities documentation, or contact Blue Pumpkin Software for assistance.

## Importing recorded call volume data

To avoid having to enter call volume data by hand, you need to be able to import call volume data from your ACD (automatic call distributor) or other source.

When PrimeTime imports call volume data, it expects the data to be in columns of numbers in a text file. PrimeTime will ignore all non-numeric information in the file, including dates in mm/dd/yy form, times, phone numbers, and so forth.

By default, PrimeTime expects the data to be reported in 15-minute increments and to cover the hours from midnight to midnight. You can, however, use the advanced options to specify different reporting intervals or start/end times and to make other adjustments for the format of the import file.

PrimeTime also expects the data to cover the full 7 days of the week. If the data covers fewer days, PrimeTime alerts you that there's not enough data to fill the week and then imports the available data day by day, starting with Monday (which works out fine if your data covers Monday through Friday, for example). This question does not arise if you're downloading directly from the ACD, as described in the previous section "Downloading call volume data from ACDs."

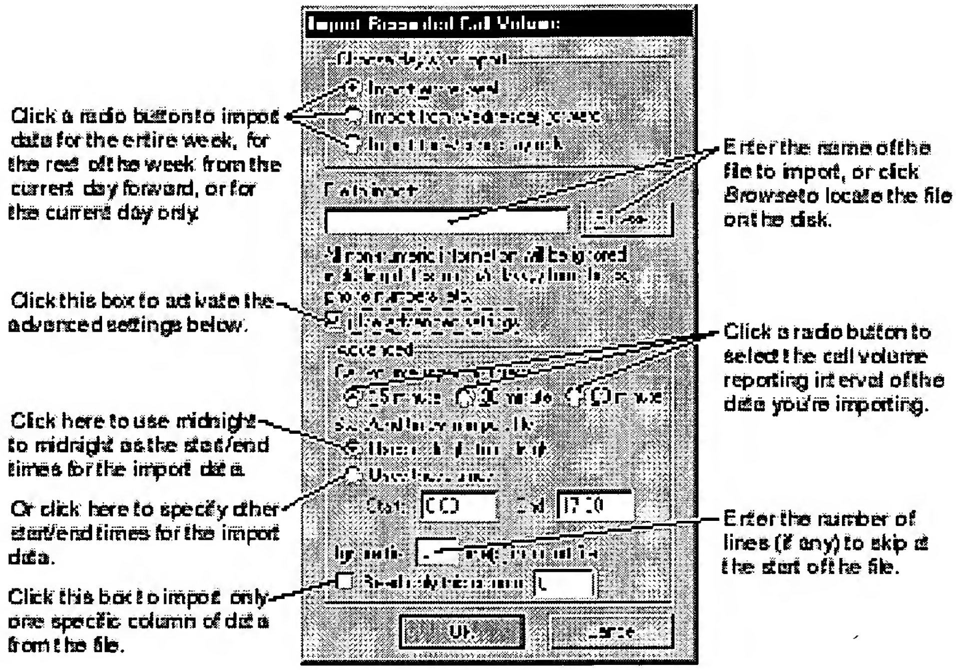
**Tip**

*When importing call volume data for the first time, or importing data from a new source or file format, always do a test to see if PrimeTime is importing the data you want from the file. Try PrimeTime's default settings first. If those settings don't produce the desired results, then experiment with the advanced options to adjust PrimeTime's import routine as needed.*

To import call volume data into PrimeTime:

1. Click the Call Volume History tab on the Home screen.
2. Click the History icon to open the Recorded Call Volumes window.

3. Click the *Import* button on the window's toolbar. The Import Recorded Call Volume window appears.




4 Click one of the three radio buttons at the top of the window to indicate whether you're importing data for the entire week, for the rest of the week from the current day forward, or for the current day only.

5 Enter the name of the file to import in the *File to import* box, or click *Browse* to locate the file on disk.

6 If necessary, use the options in the *Advanced* section to adjust PrimeTime's import routine to the format of the import data file. See the section "To use advanced import options" below for more information on those options.

7 Click *OK* to import the file.

### *To use advanced import options*

If you need to use the advanced import options in the Import Call History window, click the *Use advanced settings* checkbox to select it and activate the options in the *Advanced* section.

For the *Call volume reporting interval* option, click one of the three radio buttons to indicate whether the import data reports call volumes in 15-minute intervals, 30-minute intervals, or 60-minute intervals. (If the data is reported in 30- or 60-minute intervals, PrimeTime will divide the data evenly into 15-minute intervals.)

For the *Start/end times in import file* option, click the *Uses midnight to midnight* radio button if the import data is reported for the full 24 hours of each day. If the import data is reported for different start and end times, click the *Uses these times* radio button, and then enter the appropriate times in the *Start* and *End* boxes.

If the import file contains irrelevant numerical data at the beginning—for example, a summary of the week's daily call totals—you can tell PrimeTime to ignore a specified number of lines at the beginning of the file. Enter the number of lines to ignore in the *Ignore first _ line(s) in import file* box.

In some cases, you may need to tell PrimeTime to read only a particular column of numerical data from the import file. (For example, the data may be reported in a two-column format that gives the number of calls for each reporting interval in one column and the number of abandons for that same interval in a second column.) In such a case, click the *Read only this column* checkbox to select it, and then enter the number of the column to import in the associated text box.

For example, suppose your import data looks like the following:

```
00      14      5
15      16      3
30      20      5
```

Then if you tell PrimeTime to import only column 2, you will get the values 14, 16, and 20. On the other hand, suppose your data looks like this:

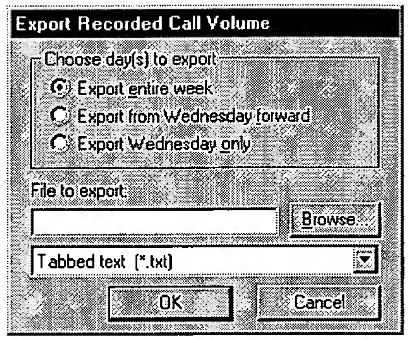
```
8:00am  14      5
8:15am  16      3
8:30am  20      5
```

In this case, you must tell PrimeTime to import column 1 in order to get the values 14, 16, and 20, because PrimeTime will automatically ignore non-numerical data like 8:00 am.

## Exporting call volume data

To export call volume data for the currently-selected week:

1. Click the Call Volume History tab on the Home screen.
2. Click the History icon to open the Recorded Call Volumes window.
3. 
Click the *Export* button on the window's toolbar. The Export Recorded Call Volume window appears.




4 Click a radio button to indicate whether you want to export data for the entire week, for the rest of the week from the current day forward, or for the current day only.

5 Enter the name of the file to save the data in, or click *Browse* to locate a file on disk.

6 Select a file format for the exported data (tabbed text, Excel 5, or HTML).

7 Click *OK* to export the data.

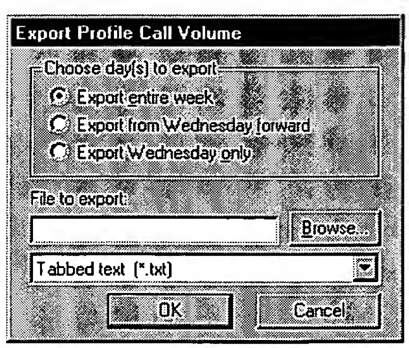
### Exporting profiles

To export call volume profiles for the currently-selected week:

1 Click the Call Volume History tab on the Home screen.

2 Click the Profiles icon to open the Profile Viewer window.

3 Click the *Export* button on the window's toolbar. The Export Profile Call Volume window appears.




4 Click a radio button to indicate whether you want to export data for the entire week, for the rest of the week from the current day forward, or for the current day only.

5 Enter the name of the file to save the data in, or click *Browse* to locate a file on disk.

6 Select a file format for the exported data (tabbed text, Excel 5, or HTML).

7 Click *OK* to export the data.

## Exporting call volume forecasts

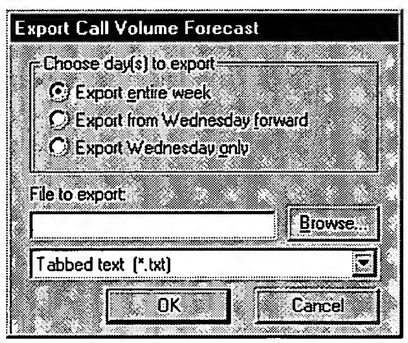
To export call volume forecasts for the currently-selected week:

1 Click the Forecast tab on the Home screen.

2 Click the Forecast icon to open the Call Volume Forecast window.

3 Click the *Export* button on the window's toolbar. The Export Call Volume Forecast window appears.

4 Click a radio button to indicate whether you want to export data for the entire week, for the rest of the week from the current day forward, or for the current day only.




5 Enter the name of the file to save the data in, or click *Browse* to locate a file on disk.

6 Select a file format for the exported data (tabbed text, Excel 5, or HTML).

7 Click *OK* to export the data.

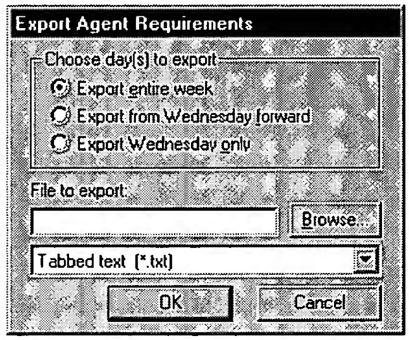
## Exporting agent requirements

To export agent requirements for the currently-selected week:

1 Click the Forecast tab on the Home screen.

2 Click the Agent Requirements icon to open the Agent Requirements window.

3 Click the *Export* button on the window's toolbar. The Export Agent Requirements window appears.




4 Click a radio button to indicate whether you want to export agent requirements for the entire week, for the rest of the week from the current day forward, or for the current day only.

5 Enter the name of the file to save the data in, or click *Browse* to locate a file on disk.

6 Select a file format for the exported data (tabbed text, Excel 5, or HTML).

7 Click *OK* to export the data.

## Exporting schedules

To export the schedule for the currently-selected week:

1 Click the Schedule tab on the Home screen.

2 Click the Schedule icon to open the Workforce Scheduler window.

3 Click the *Export* button on the window's toolbar. The Export Schedule window appears.

4 Click a radio button to indicate whether you want to export the schedule for the entire week, for the rest of the week from the current day forward, or for the current day only. Or click the radio button for *Export week view* to export a summary of the week that shows only the start and end times for each employee.

5 Enter the name of the file to save the data in, or click *Browse* to locate a file on disk.

6 Select a file format for the exported data (tabbed text, Excel 5, or HTML).

7 Click *OK* to export the data.

## Exporting reports

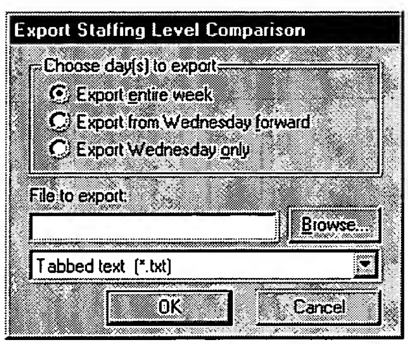
To export a report for the currently-selected week:

1 Click the Schedule tab on the Home screen.

2 Click the Reports icon to open the Reports window.

3 Click one of the five report tabs to view the report that you want to export.

4 Click the *Export* button on the window's toolbar. The Export window for the current report appears.




5 Click a radio button to indicate whether you want to export the report for the entire week, for the rest of the week from the current day forward, or for the current day only.

6 Enter the name of the file to save the report in, or click *Browse* to locate a file on disk.

7 Select a file format for the exported data (tabbed text, Excel 5, or HTML).

8 Click *OK* to export the data.

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PrimeTime F&S version 1.3

# User's Guide

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